

CALL & VISITORS CENTERS STUDY

(HOURS OF OPERATION, PART-TIME STAFFING, RETENTION, AND EMPLOYEE SATISFACTION)

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CPM CLASS 2013

SOUTH CAROLINA
PUBLIC EMPLOYEE BENEFIT AUTHORITY
(PEBA)
(RETIREMENT BENEFITS SECTION)

DATE: APRIL 8, 2013

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Introduction

The newly created South Carolina Public Employee Benefit Authority (PEBA) consists of the South Carolina Retirement Systems (SCRS) and the state of South Carolina Employee Insurance Division (EIP). This project focuses on The SCRS Customer Services Department which consists of the Customer Service Customer Intake Visitors Center (CSCI) and the Customer Service Call Center (CSCC). PEBA is responsible for administering public state retirement and insurance benefits. SCRS is the caretaker of the five defined benefit pension plans that provide lifetime retirement annuities, disability benefits and death benefits to over 530,446 eligible members. PEBA also provides a defined contribution retirement plan, the State Optional Retirement Program, which is an alternative to enrolling in the defined benefit plan. A summary of the six retirement plans is as follows: *The South Carolina Retirement System (SCRS)* was established July 1, 1945, to provide retirement and other benefits for teachers and employees of the state and its political subdivisions. *The Police Officers Retirement System (PORS)* was established July 1, 1962, to provide retirement and other benefits to police officers and firefighters. *The Retirement System for Members of the General Assembly of the State of South Carolina (GARS)* was established January 1, 1966, to provide retirement and other benefits to members of the General Assembly. *The National Guard Retirement System (NGRS)* was established July 1, 1975, to provide supplemental retirement benefits to members who served in the South Carolina National Guard. The Retirement Systems assumed administrative responsibility for this fund in 2006. *The Retirement System for Judges and Solicitors of the State of South Carolina (JSRS)* was established July 1, 1979, to provide retirement and other benefits to State Judges, Solicitors, and Circuit Public Defenders. *The State Optional Retirement Program (State ORP)* was first established as the Optional Retirement Program for Higher Education in 1987 and is now available to certain state, public school and higher education employees of the state.

Problem Statement

The PEBA membership population encompasses the entire state of South Carolina and our goal is to provide the best customer service and the most accurate information possible. The information provided to our active and inactive members, retirees, beneficiaries of retirees greatly impacts life altering decisions. PEBA consists of many departments and in seeking ideas to enhance and to possibly provide even greater services to its members. The old SC Retirement Systems underwent a major transformation because of the legislative changes approved by the SC State General Assembly which also affected the benefits offered to members of SCRS, PORS, and GARS. The Director of PEBA recognized the impact the legislative changes were causing on the Visitors and Call Center staff in providing service to our members. He was concerned about the total work environment for CSCI and CSCC, and the possible loss of staff to other department areas within PEBA, or to other outside agencies due to an increase of workload. He expressed not wanting the quality of service to our members to diminish; therefore, he asked for research on how other retirement systems' call and visitor centers operate. He wanted to know if PEBA needed to extend the hours of operations, use part-time workers to prevent the possible reduction in services provided, best practices for retention of staff, and data on the work environment for CSCI/CSCC.

Data Collection

Operational Definitions of Critical Terms

BCI	Benefits Counselor I
BCII	Benefits Counselor II
CSCC	Customer Service Call Center
CSCI	Customer Service Customer Intake
CPMC	Certified Public Manager Candidate
CS	Customer Service
EIP	State Employee Insurance Program
FLD SVC	Field Services
OSA	Other State Agencies
PEBA	South Carolina Public Employee Benefits Authority (SCRS and EIP)
RET	Retired
SCRS	South Carolina Retirement Systems Benefits Division
SUP	Supervisor
TOACS	To Other Areas in Customer Service
TOD	To Other Departments within the Agency
VC	Visitor Center

Collection Methods

The Call/Visitors Centers Executive Director and Program Managers for the SCRS assisted with collecting information for this project. We developed a plan to contact larger, smaller, and similar sized customer service call and visitor centers for other state public retirement systems to collect specific data to determine if they had: (1) extended hours of operations, (2) utilized part-time staff, and (3) possible best practices on retaining seasoned employees. In addition, a Certified Public Manager Candidate (CPMC) would gather the information for SCRS and developed the survey to administer to SCRS's Customer Service staff.

The group decided eighteen state public retirement systems across the United States would be good sample size to gather information needed for this project. Twelve of these systems are comparatively similar to SCRS in membership size. In addition, we elected to include six other systems that are within close geographical proximity or may have varied work operations.

The team decided on nine exploratory questions (Appendix A) to query with the eighteen state public retirement systems. Fourteen of the 18 systems contacted responded (Appendix B). Although the four areas of concern cited on page 2 in the problem statement are the focal points, the research team collected additional information about position types and salaries that PEBA could possibly use to conduct another study concerning compatibility of SCRS's CS staff's salaries with those of other public state retirement systems with similar positions.

To ensure the validity and reliability in this project, the research team took a systematic approach to lessen the burden of collecting data by asking the same questions to the selected retirement systems. The team also used informative resources such as telephonic and E-mail communications with Customer Service Managers/Directors of the other state public retirement systems, that state's retirement system websites, and their Annual Reports. All information collected was given to the CPMC for compilation

and development of Fact Sheets (Appendix C) and additional documents needed for this project. The data needed to assist with the decision process has been extracted from the Fact Sheets in (Appendix C) into Appendices E through M along with other pertinent information in Appendices N through P.

Customer Service Survey

The Customer Service Call Center/Customer Intake Visitors Center survey was administered to twenty-three staff members (not including supervisors) of the SC Public Employee Benefit Authority Retirement Benefits Division Section. Questions administered are shown in (Appendix D).

Data Analysis

The findings pertaining to the first three primary concerns are extracted from the information provided by the selected retirement systems and listed below. SCRS information is listed separately.

Fact Sheet information from Selected State Retirement Systems:

- Four of fourteen public Retirement Systems have extended hours of operations. (Indiana, Illinois, Iowa, and Texas) (Appendix E)
- Five of the fourteen public Retirement Systems utilize some type of part-time help (Arizona, California, South Carolina, Virginia, and Washington) (Appendix F).
- Retirement benefit plans/programs administered range from one to as many as eight (Appendix E).
- The retirement systems memberships ranged from 862,192 members to as low as 105,617 members (Appendix E).
- Total number of full time Visitor/Call Centers' staff ranged to as many 87(rounded up) down to seven (Appendix F).
- Using 10,000 members as a base for workload comparison, the average is at least one staff member in the call/visitor centers per each 10,000 members serviced. (Appendix G).
- Part time staff utilization ranged from 17 people down to 2 people (Appendix F).

- The average call volume ranged from as many as 1,228 calls per day down to 80 calls per day (Appendix H).
- The average visitor consultations ranged from as many as 100 per day down to ten per day (Appendix I).
- Training time for staff varied from as little as four weeks to as much as two years depending on level of positions (Appendix C).
- Seven Retirement Systems indicated they have some type of retention plan (Appendix M).
- Turnover rate ranged from losing ten staff members over a ten year period down to having very little turnover at all (Appendix J).
- Two Retirement Systems do not have Call Centers (Missouri and Washington) (Appendix H).
- Six Retirement Systems utilize all Customer Service staff to counsel visitors and answer incoming calls (Iowa, Louisiana, Missouri, New York, North Carolina, Washington) (Appendices C and H).
- One Retirement Systems Visitors' Centers conduct visits by appointment more so than a first come, first serve basis (California) (Appendix C).
- Two Retirement Systems have at least 50 plus staff members in their Customer Services to meet the demands of their stakeholders (California and Washington) (Appendix H).

Fact Sheet information for PEBA Retirement Benefits (SCRS)

- No extended hours of operation: The core hours for the Visitor and Call Center is from 8:30 am to 5:00 pm---except a small call center staff works from 8:45 am to 5:15 pm
- Administers six Retirement System plans/programs (Appendix E).
- Provide services to 530,446 members as of 6/30/2012 (Appendix E).

- Using 10,000 members as a base for workload comparison, the average is at least one staff in the call/visitors center per each 10,000 members serviced. (Appendix G).
- SCRS has 31 full time Visitor/Call Centers staff (Appendix H).
- One part time staff utilized in Visitors Center as the Receptionist (Appendix H).
- The average number of calls for fiscal year 2012 is 667 per day (Appendices C, H, & P).
- The average visitor consultations for fiscal year 2012 are 70 per day (Appendices C & I).
- Call Center Staff Training—Initial Hire—two to three months—extended if additional training is required for a subject area—afterwards—refresher training is continuous, takes about one year for a person to become totally effective in responding to questions asked by phone (Appendix C).
- Visitors Center Staff Training--Continued based on self-taught and supervisor training refresher classes (Appendix C).
- No retention plan in place (Appendix C).
- Since January 2009 through August 2012: Call Center—96% turn-over of employees. The CC should have 24 staff members---lost 21 positions that were either a Benefits Counselor I (BCI) or Benefits Counselor II (BCII) positions, have filled 18 of the vacancies and still have a shortage of three unfilled positions (Appendix J). The PEBA Director decided not to fill the remaining Call Center positions until he knows if positions can be filled if and when SCRS and EIP merge into one agency.
- The visitors' and call center staff assist each area with calls and visitor consultations
- Members/retirees/beneficiaries can make appointments to avoid waiting for a consultation based on first come, first serve. SCRS offers ten appointments per day.
- SCRS total operations is in one building and located in Columbia, South Carolina

Summary of Findings Based on Areas of Concern:

Total hours of operations for the retirement systems—(Appendix E)

Iowa, Illinois, Texas (ERS), and Missouri public Retirement Systems opened for business as early as 7:30 a.m. Of these four systems, one has close of business of 4:30 pm, one at 5:00 pm and two at 5:30 pm. The only exception to the normal work hours is, Indiana Retirement System's Call Center is operated by an outside vendor and not staffed by employees of the retirement system. It starts business operations at 8:00 am and closes at 8:00 pm. The outside vendor represents the Define Contribution Plan whereas the actual employees of the Indiana System work the normal core hours of 8:00 am to 5:00 pm and services members of their Define Benefit Plans.

California, North Carolina, Virginia, and Arizona have membership sizes larger than PEBA and open as early as 8:00 a.m. and closes at 5:00 pm. Virginia opens for business at 8:30 am.

SCRS opens at 8:30 am and closes at 5:00 pm with a small call center staff working from 8:45 am to 5:15 pm to answer any calls left in the call queue after 5:00 pm.

New York system opens from 8:30 am to 4:15 pm.

Louisiana system opens from 8:30 am to 4:30 pm.

Georgia, Alabama, and Washington State systems open at 8:00 am and close at 5:00 pm.

The utilization of part time staffing in the Call Centers—(Appendix K)

Three Retirement Systems (California, Virginia, and Arizona) with membership size larger than SCRS and two with smaller membership sizes (Washington State and Alabama) utilizes part-time staff as needed in their call centers

North Carolina System has the largest average calls per staff member per day of forty-one which was the highest of the fourteen systems and utilizes no part-time employees.

SCRS has the second largest calls per staff member of thirty-two and utilizes no part-time employees.

The average calls per staff member for all the systems ranged from forty-one calls per staff member down to four.

The utilization of part time staffing in Visitor Center—(Appendix L)

Washington State has no call center and all 85 full time staff members with 2 part-time employees answer calls and counsel visitors. Therefore, with average visitors seen of 28 per day, a portion of their staff members will counsel one visitor per day

California Retirement--part-time employee works 2-3 day per week during their peak season

SCRS has ten full time staff members whose main job is to counsel visitors. The part-time receptionist also handles routine visitor matters at the front desk. The system has on average of 70 visitors per day with an average of seven (rounded) per day per staff member.

Only the systems listed above utilizes part-time employees in their Visitor Centers

The average number of visitors per staff per day for the fourteen systems ranged from nine per staff member to one per staff member per day.

Customer Service Department Retention Planning

Seven state retirement systems indicated they have some type plan in place to entice employees to maintain employment with the agency. Georgia, Missouri, and Virginia appear to offer extensive training, good benefits package, and compensation. It also appears, based on information provided; Virginia provides in-grade monetary adjustments for learning and acquiring new knowledge. An overview of the retention methods for the seven other public retirement systems and SCRS are in (Appendix M). Additionally, information gleaned concerning retirement systems' staff turn-over rates range from 96% as a high to having loss only 10 people in ten years (Appendix J).

Customer Service Survey (SCRS)

The purpose for administering the survey was to examine the Customer Service Visitors and Call Center's staff satisfaction as it relates to the work environment. I solicited the employees' honest

opinions about the current work environment in hope of identifying for the Director, key factors affecting employee satisfaction. The Visitor and Call Centers have a complex environment that must effectively combine knowledge, technology, and workflow to provide quality customer service. Customers calling or visiting SCRS expect the phone and/or face to face consultations responses promptly. They also expect courteous treatment by knowledgeable Customer Service Representatives who can resolve their issues quickly. Our key duty is to provide excellent customer service and failure to do so, leaves the customer displeased, disappointed, and frustrated.

The responses to the survey indicated the majority of the staff was very satisfied with the organization because of the reputation the Customer Service Department has, their job, members of the team, their supervisors, and the continuous training received.

However, there were a few key problem areas:

- (1) Over half the staff indicated they would not turn down employment with comparable or more pay if they had the opportunity to leave this agency.
- (2) Over half the staff mentioned they are not fairly compensated for their work and the organization does not care about its employees.
- (3) The majority of the CS staff voiced an opinion concerning the non existence of pay increases and wants more flexible work hours than those already offered.
- (4) Survey question 17—almost half the CS staff surveyed believes there is a communications problem between employees and leadership.

(Appendix N--Survey Executive Summary)

(Appendix O--Chart—Responses to each question by category)

Recommendations Based on Areas of Concerns:

The recommendations listed below for each area of concerns are suggested from the analysis of the information obtained from the selected state public retirement systems and SCRS Appendices C through M, the survey results from the internal CS survey concerning the work environment Appendices N and O, and the four fiscal years of calls and visitors history commencing with fiscal year 2009 and ending with fiscal year 2012 (Appendix P). The recommendations and/or suggestions could be viable solutions for the increase of morale in the SCRS' Call and Visitors Centers and assist with the retention of the customer services employees and employees of other functional areas of PEBA.

The hours of operations for the retirement systems

It is recommended or suggested for PEBA not to change or extend the core work hours operations for the SCRS Customer Service Department or this agency. SCRS Customer Service staff has always managed to handle the work load within the current designated work hours. The Call and Visitors Center most extremely busy times are when legislative changes affect the members of the systems, school spring breaks, special letter mailings, and during the income tax season. A review of the top seven systems shows that three systems with membership sizes larger than SCRS and four systems with membership sizes that were comparatively similar have core work hours that commence at 8:00 am or 8:30 am and close business operations each day at 5:00 pm (Appendix E). New York System is the only system of the seven that closes earlier than 5:00 pm. The Indiana system's core hours for their Call Center were the only exception to the normal business hours (see page 8 above). Additionally, the membership sizes for the seven systems ranged from 856,360 to 427,000 with SCRS supporting 530,446 members (Appendix E). The remaining seven systems with much smaller membership sizes have core hours that start as early as 7:30 am and closes business operations no later than 5:30 pm. Of the fourteen selected state retirement systems, California is the only system that indicated it offers retirement

consultation visits by appointments only on Saturdays. All selected systems are open Mondays through Fridays (*page 8 for total hours of all systems' hours of operation*).

The utilization of part time staffing of the Call Center

It is recommended or suggested no part-time staff assistance is needed in the SCRS Call Center but to fill the existing vacant full time positions. The recommendation is based on the time needed to fully train an individual to be totally effective in the call center. It has been the experience that it takes a person about one year to become totally effective in responding to questions asked by phone. Also for this reason, it would take a longer period of time to train the part-time employees because they work lesser hours during the work day. In addition to the above reasons, the Customer Service Department staff believes in quality and not quantity and therefore the time required is given the caller to have their needs met. The call center does experience abandoned calls because of this level of service. It is not the quantity but the quality of service the staff has been training to provide. Therefore, the hiring of full time employees and during and after training would provide longer available hours that can help reduce the call abandonment rate. Each year the call center has a high number of abandoned calls. Based on a four year average from fiscal year July 2009 through June 2012, the SCRS call center experienced its average highest number of abandon calls during the months of November (3,083), January (6,745), February (4,064), May(3,941) and June (4,389). The remaining months have a call abandonment average ranging from 1,794 to 2,944 calls (Appendix P). A few reasons are; retirees are seeking information on federal tax changes and mailing of the 1099R tax forms during the month of January each year; anytime when special letters are mailed with information affecting a certain segment of retirement system members, articles rumored by any state newspaper, and especially when there are major legislative changes. The last major changes were in 2005 until recent changes effective July 1, 2012 and January 2, 2013. Abandon calls also happen when members decide to stop the call before talking to a live person, or they call on a state or federally recognized holiday or the weekend when the

call center is closed. The major factor for call abandonment during fiscal year 2012 and half of fiscal year 2013 is because of legislative changes (Appendix P--Fiscal Year Call/Visitor Data). Staff members from the SCRS's Visitors' Center do assist with call center calls as time is permitted. Further justification to hire full time employees rather than part-time persons is as follows: Calculation method:---January 2011 month is extremely high because of calls concerning federal tax changes and why net benefit annuity amounts decreased. The system also had 10,277 calls in one day (1/31/2011). February 2011 also had a spike in calls. In order to bring the abandoned calls in line with other months, I remove the abandoned call totals for January and February 2011 and enter reasonable average abandon call figures based on a 3 year average (Appendix P). Therefore, instead of an estimated 38, 445 average abandoned calls over four years, the call center has an estimated average of 32,720 abandoned calls. The abandoned call average of 32,720 indicates there are at least 132 more calls coming into the call center per day based on a work year of 247 days. The per staff average daily call rate is 32 per person and to answer 132 more calls per day, the call center needs at least four additional full time employees in the call center (Appendix P). Additionally, when utilizing a workload equalizer base of per every 10,000 retirement system members as an indicator, the projections show all the retirement systems in this survey have between .32 and 1.81 people to serve every 10,000 of its members. PEBA's figure of .60 per 10,000 was slightly below the average of all states surveyed. (Appendix G). Additionally, the survey information from the selected state retirement systems indicated the retirement systems with membership size larger than SCRS on average answer fewer calls per day than the SCRS Call Center staff (Appendix K).

The utilization of part time staffing of the Visitor Center

It is recommended or suggested that no part-time counseling staff is needed in the SCRS's Visitors' Center except for the one part-time staff receptionist we currently have. It is also recommended that we remain at the current staffing level. When comparing SCRS with the selected state retirement systems,

North Carolina system has the most visitors per day of 100 and has eleven full time staff with no part-time employees. Based only on Fiscal Year 2012 data, SCRS has eleven staff members available (includes the part-time receptionist) and is tied for second with Arizona Retirement System with an average of 70 visitors per day. Arizona has only ten full time available staff members. The average for the three systems is nine to seven visitors per staff member per work day. The remaining systems have less than fifty visitors per work day and have an average of seven to one visitor per staff member per work day (Appendix L). SCRS' workload for fiscal year 2012 (July 2011 through June 2012), and part of fiscal year 2013 (July through December 2012) was extremely heavy because of major legislative changes. The normal daily average is fifty-five visitors visiting the Visitors' Center per day without any major changes and would give our staffing an average of five visitors per staff member per day (Appendices I & P). Additionally, the recommendation not to utilize part time employees and always hire full time employees is based the training, skills, and abilities needed as a Benefits Manager to perform consultations. There is also limited supervision and information is provided to assist member with life changing decisions.

Customer Service Department Retention Planning

Seven other state Retirement Systems indicated they have some type of plan in place to assist with keeping Call/Visitors Centers staff and we recommend or suggest PEBA adopts some of their strategies. The Customer Service Department already has a very comprehensive and extensive training program, a good state benefits package, but we lack in the area of rewarding accomplishments. The Virginia Retirement System appears to have a good model in place. Therefore the following incentive programs are recommended for implementation to encourage the employee retention with this agency.

(1) Increase in salary or give bonuses for the employee that obtains a college degree, (2) Monetary bonuses when a suggestion leads to savings for the agency, (3) In-grade adjustments for learning and acquiring new knowledge/skill and, (4) Increase in salary or a bonus for completion of certification

programs that are job related. Although not part of retention, the Customer Service Department utilizes a succession plan as part of the efforts to retain our employees and create a pool of qualified applicants for promotion to the next level in their career path as positions become available. Unfortunately, due to hiring freezes, budget cuts, and possible merger with State EIP, the pool of applicants does not have the opportunity for promotion to the next level in either the Call or Visitors Centers.

Customer Service Staff Survey

Recommendations or suggestions for the key problems listed on page 11:

- (1) Recommend or suggest the agency allow the managers of Customer Service Department to match the salary offered by an outside agency or another department within this agency not to exceed seven to ten percent increase in salary to entice an employee to remain with the Customer Service Department,
- (2) Recommend or suggest based on recommendation 1, that the agency have a cost analysis performed to determine if it is more cost effective for this agency to continue to hire and train new Call Center employees or offer an increase in salary to retain the employee that is leaving to determine if retaining the employee would be a net cost gain to the agency.
- (3) Allow the reimplementation of in-grade increases base on performance and knowledge base
- (4) Have a “salary study” done to ensure the Customer Service Staff’s salaries are comparable with other state agencies where the Customer Service Call and Visitor Centers staff have similar responsibilities,
- (5) Allow the Customer Service Managers to offer more flexible daily work hours as long as these hours do not hinder the main goal of providing excellent customer service to our members and,
- (6) Recommend or suggest this agency implement and support having better communication channels. A suggestion is to have more open forums about changes affecting the agency and staff members to ask questions and dialog with persons in leadership positions.

Appendices:

Appendix A

Customer Service Questions to other Retirement Systems in this Project

CPM Project
Customer Service Survey Questions to Other State Retirement Systems

July 9, 2012.

To Whom It May Concern:

The SC Retirement Systems is conducting a study on Retirement Systems Call and Visitor Centers that are comparable in membership size to SCRS. Presently, our Customer Service staff consists of (22) in our Call Center and (11) in our Visitors Center with primary responsibility to perform telephone consultations and/ or to provide retirement consultations in our Visitors' Center. Our telephone and visitor volumes have increased significantly due to proposed legislative changes and we are seeking innovative ways that other Retirement Systems may be operating their Customer Service Units.

Your assistance in responding to the following questions would be extremely helpful to us in compiling data to include in our study:

1. What are your hours of operation for the Call and Visitors' Center(s)?
2. How many staff members do you have in the Call and Visitors Center(s)?
3. Do you utilize part-time employees in these work areas, if yes, what are their working hours and do they have benefits?
4. What levels of positions do you have, i.e., Benefits Specialist I, II?
5. How much training is required before a staff member is considered proficient in the job?
6. Provide data on the average number of calls and visits per day?
7. Do you have "Walk-in or Appointment only" consultations or both?
8. What is the average turnover rate in the Call and Visitors' Center positions?
9. What specific method or best practice do you employ to retain experienced staff?

Point of Contact at SC Retirement System:

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Appendix B

List of Other Retirement Systems Surveyed

OTHER STATES RETIREMENT SYSTEMS LIST (Excluding South Carolina)

Systems Comparatively similar:

- Arizona State Retirement System (ASRS)
- California State Teachers Retirement System (CALSTRS)
- Illinois Municipal Retirement Fund (IMRF)
- Indiana Public Employees' Retirement Fund (PERF)
- Iowa Public Employees' Retirement System (IPERS)
- North Carolina Retirement System (NCRS)
- Virginia Retirement System (VRS)
- Washington State Department of Retirement System(WA DRS)

Systems in close geographical proximity

- Teachers Retirement System of Georgia(TRSGA)
- Alabama Employees' Retirement System(ERSAL)
- Missouri State Employees' Retirement System (MOSERS)
- Employees' State Retirement of Texas (ERS)
- Louisiana State Employees' Retirement System (LASERS)
- New York State Teachers Retirement System (NYSTRS)

Appendix C

Fact Sheet for each Retirement System

South Carolina Retirement Customer Service Study
Alabama Employees' Retirement System (ERS)

FACT SHEET

The System provides a defined benefit plan which was created in 1945 to state employees, state police to qualified persons of cities, towns and quasi-public organizations.

<p>Number of Systems Administered: (3) Systems</p> <ul style="list-style-type: none">• Employees' Retirement System• Teachers' Retirement System• Judicial Retirement Fund <p>The Teachers' Retirement System is the administrator of the Public Education Employees' Health Insurance Fund (PEEHIF). See attached documents for reference. Retirement and Insurance offices appear to be in the same building.</p>
<p>Membership Size: 373, 209 members and retirees</p>
<p>Hours of operation: The Call Center receives incoming calls from 8:00 a.m. – 5:00 p.m., Monday – Friday and the Visitors Center provides consultations from 8:30 a.m. - 4: 30 p.m.</p>
<p>Number of staff in Call and Visitor Center: The Contact Center is staffed with (25) full-time employees. Senior staff is responsible for all visitor consultations.</p>
<p>Number of part-time staff/benefits, if utilized: Part-time summer interns are used with no benefits.</p>
<p>Levels of positions:</p> <ul style="list-style-type: none">• Retirement Counselor• Senior Retirement Counselor• Retirement Benefit Analyst• Retirement Benefit Analyst Supervisor. <p>An entry level Benefits Counselor is \$32,000 per year.</p>
<p>Required training time: The required training time for new hires is nine monthswhich is their probationary period.</p>
<p>Average number of calls/visits per day: The average call volume is 80 per day and they only see 15-20 visitors per day. Their goal is to schedule appointments only, but do accept walk-ins..</p>
<p>Average turnover rate in positions: Turnover generally 3-5 years.</p>
<p>Specific method to retain experienced staff: There is no specific retention method since turnover rate is not excessive.</p>

South Carolina Retirement System Customer Service Study
Arizona State Retirement Systems (ASRS)

FACT SHEET

Arizona State Retirement Systems (ASRS) – provides retirement benefits, long-term disability benefits and other benefits to employees of the state, counties, municipalities, universities, community colleges, school districts and other political entities.

Number of Systems Administered: ASRS offers (5) programs. Defined Benefit Plan, Health Insurance premium benefit, Long Term Disability Income Plan, Defined Contribution Plan (System) and the Optional supplemental salary deferral retirement savings plan.

Membership Size: 538,776 active, inactive, retirees and beneficiaries

Hours of operation: ASRS has two offices, one in Phoenix and one in Tucson. Business hours at both locations are Monday through Friday from 8:00 a.m. to 5:00 p.m., excluding holidays. As of April 2, 2012, introduced a new Appointment Scheduler requiring all-in-person counseling sessions to be done by appointments. This change allows them to anticipate demand, decrease wait times, and prepare in advance for individual consultation of up to 30 minutes. Sessions include Health, Long-term disability and Dental information.

Number of staff in Call and Visitor Center: (46) total staff...with (36) in the Call Center to include (3) Supervisors. The Appointment Center is staffed with (10) employees. Since all in person counseling sessions require appointments, supervisors handle most of the walk-ins. Objective to serve walk-in-customers within 15 minutes.

Number of part-time staff/benefits, if utilized: The Call Center employs (4) part-time positions on Monday, Tuesday and Wednesday to accommodate their heaviest volume of calls with work beginning at 9:00 a.m.

- Two employees work (20) hours per week – (8) hours on Monday and Tuesday and (4) hours on Wednesday and have no benefits;
- Two employees work (30) hours per week @ (6) hours per day with benefits.

Their Call Master has (3) separate queues ...Retiree...Active Contributing Members and Member Services. Part-time staffers are placed on the easiest calling queue which requires a lesser knowledge base

Levels of positions:

- Retirement Benefit Advisor Salary Range: \$29,008 to \$35,734
- Retirement Advisor Team Leader Salary Range: \$40,000 to \$53,387

Required training time:

Average number of calls/visits per day: Generally a 1,000 calls on Monday, 900 on Tuesday, and 700 on Wednesday. Average annually calls of 135,200 with an average per day of 520 calls. Average visitors per day is 70.

Average turnover rate in positions: Tenure is generally one and half years.

Scott James – Program Manager of Member Advisory Center - (602)-240-2002

South Carolina Retirement Systems Customer Service Study
California State Teachers' Retirement System

FACT SHEET

California State Teachers' Retirement System (CalSTRS) – Administers a hybrid system for members and is the largest U.S. largest teacher's retirement fund. A Teachers' Retirement Board comprised of (12) members has exclusive control over the investment and administration.

Number of Systems Administered: (3) Plans:

- Defined Benefit Plan
- Defined Benefit Supplement Plan (a cash balance plan)
- Pension 2 (a defined contribution plan)

Membership Size: 862,192 members and beneficiaries

Hours of operation: CalSTRS maintains two year-round member service centers located in West Sacramento and Glendale. Telephone counseling appointment operating hours are Monday – Friday from 8:00 a.m. – 5:00 p.m. These appointments are available for those members who either do not live near a CalSTRS office or who find it more convenient to have the appointment via telephone. The Member Service Center operates Monday – Friday, 8:00 a.m. – 5:00 p.m., and by appointments on Saturdays. There is also general walk-in assistance.

Number of staff in Call and Visitor Center: Currently there are (13) on staff to provide face-to-face consultations. Glendale does not accept incoming calls since this function is primarily handled by the Sacramento center. Sacramento employs about (40-50) staffers in their Call Center.

Number of part-time staff/benefits, if utilized: Glendale center uses retired workers, student workers and permanent intermittent workers on a part –time basis during peak seasons at least (2-3) days per week. Benefits are pro-rated for the permanent intermittent workers.

Levels of positions: (3) levels –

- Pension Program Manager,
- Pension Program Representative I and II - also called Benefits Counselors.

Required training time: An extensive six-week training session is required and thereafter a one month mentoring period.

Average number of calls/visits per day: On an average, Glendale (visitors only) has approximately (500-600) visits per year. Calls per day—1,228 at the West Sacramento, CA Call Center location only

Average turnover rate in positions: CalSTRS does not experience a lot of turnover.

Specific method to retain experienced staff: Their big focus is on core values and employee enrichment. They believe they have a Class A hotel environment that behaves more like a financial agency and find it is attractive to staff and others.

April Reynolds – Glendale Member Service Manager

South Carolina Retirement System Customer Service Study
Teachers Retirement System of Georgia

FACT SHEET

Teachers Retirement System of Georgia (TRS) - The System created in 1943 is the largest public pension fund in the State of Georgia. It provides retirement to all personnel in the public school systems, technical colleges, Regional Educational Service Agency units, and all colleges and universities comprising the University System of Georgia. (TRS) is governed by a ten-member Board of Trustees which appoints an Executive Director.

Number of Systems Administered: (1) System - TRS provides members with a defined benefit plan and a defined contribution plan.

Membership Size: 394,00 active and retired members

Hours of operation: The Call Center receives incoming calls from 8:00 a.m. - 5:00 p.m., Monday - Friday and the Visitors Center provides consultations from 8:30 a.m. - 4:30 p.m.

Number of staff in Call and Visitor Center: The Call Center is staffed with (13) representatives comprised of (1) Manager, (1) Call Center Team Lead and (11) Call Center Representatives. The Visitors' Center has (13) Counselors comprised of (1) Receptionist, (2) Retirement Counselors Team Lead and (10) Retirement Counselors.

Number of part-time staff/benefits, if utilized: There are no part-time workers.

Levels of positions:

- Call Center Representatives
- Team Lead
- Call Center Manager
- Retirement Counselor Team Lead and Retirement Counselors

Required training time: The required training time is (6-9) months. The employee is quality checked on each process for a 3 month period before being released and must be released on all processes to be fully trained.

Average number of calls/visits per day: The average number of calls received is 350 per day and they have approximately 18 member visits per day. Appointments and walk-ins are accepted.

Average turnover rate in positions: The turnover rate is minimal for both areas.

Specific method to retain experienced staff: TRS offers extensive training and a good benefits package.

Diann Green - Dir. of Retirement Services and Dina Jones - Dir. of Member Services (404) -352-6567

South Carolina Retirement System Customer Service Study
Illinois Municipal Retirement Fund (IMRF)

FACT SHEET

The Retirement Fund was established in 1939 and is a multiple-employer public retirement system whose membership includes employees of local units of government in Illinois. IMRF is separate and apart from the Illinois state government.

Number of Systems Administered: (3) Systems : <ul style="list-style-type: none"> • Regular Tier I and Tier 2 Plan • Sheriff's Law Enforcement Personnel Plan (Tier 1 and Tier 2) • Elected County Officials Plan (Tier 1 and Tier 2) and Original ECO. All of the above are defined benefit plans.
Membership Size: 275,528 active and retired members
Hours of operation: The Call Center receives incoming calls from 7:30 a.m. – 5:30 p.m., Monday – Friday and the Visitors' Center provides consultations by appointment only from 8:30 a.m. – 4:30 p.m.
Number of staff in Call and Visitor Center: IMRF has (2) Call Centers: (4) staff in one center and (11) in the other. They also have (2) Member Service Specialists, (1) Member Service Analyst and (1) Supervisor in each location.
Number of part-time staff/benefits, if utilized: There are no part-time workers
Levels of positions: <ul style="list-style-type: none"> • Membership Service Representative • Member Service Specialist, • Member Service Analyst. <p style="text-align: center;">Entry Level Salary @ \$31,348 - \$34,000.</p>
Required training time: The training time is (12-14) weeks with classroom self -study, monitoring and on the job training with others.
Average number of calls/visits per day: The average number of calls received is 500/600 per day and they have approximately 18 member visits per day. Appointments and walk-ins are accepted
Average turnover rate in positions: They experience very little turnover
Specific method to retain experienced staff: No retention plan cited

Connie Fox – Member and Field Services -603-368-5369

South Carolina Retirement Systems Customer Service Study
Indiana Public Employees' Retirement Fund

FACT SHEET

Indiana Public Employees' Retirement Fund (PERF) – Includes hybrid plans for eligible state and local employees. The fund is a trust and an independent body, corporate and politic meaning it is not a department or agency of the State, but is an independent instrument exercising essential government functions.

Number of Systems Administered: (6) Systems/Plans

- PERF and Teachers' Retirement Fund - are the hybrid plans)
- Police Officers' and Firefighters' Pension and Disability Fund
- State Excise Police, Gaming Agent Control Officers and Conservation Enforcement Officers' Retirement Plan
- Judges' Retirement System
- Prosecuting Attorneys' Retirement Fund
- Legislators Retirement System – Defined Benefit Plan

Membership Size: 500,000 plus members and retirees represented in the six plans.

Hours of operation: Call Center has (2) Tiers. **Tier 1:** 8:00 a.m. – 8:00p.m., and **Tier 2:** 8:00 a.m. – 5:00 p.m. Tier 1 represents the defined contribution plan and is managed by an outside vendor. They field calls regarding investments, change of address, taxes, etc. Tier 2 represents the defined benefit plan and is managed by the public agency.

Number of staff in Call and Visitor Center: Tier 2 (D/B plan) currently has (12-14) on staff, but usually staffed with (18-20). Visitor Center is staffed with (5) employees.

Number of part-time staff/benefits, if utilized: No part-time staff

Levels of positions:

- Customer Service Representative
- Team Leader, Quality Coach
- Call Center Manager
- Entry salary level – low 30's.

Required training time: Training time is (4) weeks with a combination of class room, listening to calls, quizzes, handling calls while someone is monitor.

Average number of calls/visits per day: Average number of calls per day in Tier 2 - (Call Center) is 350-400. Visits are mainly by appointment but they do have walk-ins. Each counselor sees approximately 5-6 customers per day.

Average turnover rate in positions: They have experienced recent turnover.

Specific method to retain experienced staff: No retention plan.

South Carolina Retirement Systems Customer Service Study
Indiana Public Employees' Retirement Fund

Kathleen Koontz – Call Center Manager

South Carolina Retirement Systems Customer Service Study
Iowa Public Employees' Retirement System

FACT SHEET

Iowa Public Employees' Retirement System (IPERS) – The plan created in 1953 is a contributory defined benefit plan created in 1953 and replaces the Iowa Old-Age and Survivors' Insurance System. It is an independent agency within the Executive Branch of State Government. A Benefits Advisory Committee was established to advise IPERS and the General Assembly on benefits and services. (See attachment)

Number of Systems Administered: (1) System – provides a plan for current public employees of schools, state agencies, counties, cities, townships and other public entities. There are (3) Membership Classes:

- Regular,
- PORS and Firefighters,
- Correctional Officers.

IPERS does not cover judges, peace officers, police and fire personnel in cities with populations over 8,000 and university and community college personnel who elect other coverage.

Membership Size: 328,975 members and retirees

Hours of operation: Calls are responded to from 7:30 a.m. – 5:00 p.m., Monday - Friday and visitors are seen from 8:00 a.m. – 4:30 p.m., Monday – Friday.

Number of staff in Call and Visitor Center: The Call and Visitor Center has (24) Retirement Officers and (2) Supervisors. The same group sees visitors.

Number of part-time staff/benefits, if utilized: All staff is full-time

Levels of positions:

- Retirement Benefits Officers - entry level salary of \$35,547
- Retirement Benefits Officer Senior- entry level salary of \$43,784

A college degree is preferred or minimum training, experience and education in substitution of four years.

Required training time: The required training time for new hires is six months

Average number of calls/visits per day: The average call volume per day is (375) and the average visitor volume per day is (15). They accept walk-ins and appointments.

Average turnover rate in positions: No turnover to speak of, only retirements.

Specific method to retain experienced staff: No specific method of retention

Sam Herr – Call Center Manager – (800)-622-3849

South Carolina Retirement Systems Customer Service Study
Louisiana State Employees' Retirement System (LASERS)

FACT SHEET

The System is a single employer defined benefit plan established in 1946 for state officers, employees and their beneficiaries. A twelve member Board of Trustees governs the System.

Number of Systems Administered: (1) System – LASERS provides members with a defined benefit plan and a defined contribution plan.
Membership Size: 152,725 active, inactive and retired members
Hours of operation: The Member Service Center hours of operation is 8:00 a.m. – 4:30 p.m., Monday-Friday.
Number of staff in Call and Visitor Center: There are (10) Analysts, (1) Supervisor, and (2) Receptionists on staff. The Analysts answer calls and see visitors, (7) Analysts are in office at all times and (3) Analysts work with Field Education offering seminars daily or as needed.
Number of part-time staff/benefits, if utilized: There are no part-time workers.
Levels of positions: <ul style="list-style-type: none">• Benefit Analyst I, II, and III Entry level is promoted to a Benefits Analyst I within a year. The average starting salary is \$39,000. Analysts initially begin in the Claims Unit. Their ultimate goal is to transfer to the Call Center. There is a \$2.00 premium pay per hour added to the regular salary for Analysts.
Required training time: Analyst begins their initial work functions in the Production Units, then transfer to the Member Services in one month.
Average number of calls/visits per day: The average number of calls received per month is 6,000. They serve on the average of 30-40 visitors per day. Appointments and walk-ins are accepted.
Average turnover rate in positions: LASERS does not experience a high degree of turnover. Have people retiring from the Member Service Center.
Specific method to retain experienced staff: There is a \$2.00 premium pay per hour added to the regular salary for Analysts who work in the Call Center

Autumn Sullivan (225) 922-2424

South Carolina Retirement Systems Customer Service Study
Missouri State Employees' Retirement System (MOSERS)

FACT SHEET

MOSERS, established in 1957, administers a defined benefit plan for the purpose of providing retirement, life insurance and long-term disability benefits to different classifications of employees. It was further assigned the task of providing most members of the system with life and long term disability insurance. The administration of MOSERS is vested in an (11) member board of trustees.

Number of Systems Administered: (4) Systems/Plans - <ul style="list-style-type: none"> • Missouri State Employees Plan • Legislators' and Elected State Officials' Retirement • Judicial Plan • Administrative Law Judges and Legal Advisors' Plan
Membership Size: 105,617 active, terminated/vested and retired members as of 2011
Hours of operation: The Call Center is open Monday-Friday from 7:30 a.m. – 4:30 p.m.
Number of staff in Call and Visitor Center: MOSERS has (6) Benefit or Senior Benefit Counselors and 1 Benefit Technician. The Counselors answer calls and see visitors
Number of part-time staff/benefits, if utilized: There are no part-time workers
Levels of positions: <ul style="list-style-type: none"> • Benefit Counselor and • Senior Benefit Counselor <p>Entry Level Salary @ \$40,000</p>
Required training time: The training time is (13) weeks
Average number of calls/visits per day: The average number of calls incoming calls is 124 per day (30,876 for the fiscal year). The average number of visitors seen is 12-15 per day
Average turnover rate in positions: They experience very little turnover
Specific method to retain experienced staff: MOSERS offers a good compensation and benefits package

PamPalmquist – (800) 827-6118

South Carolina Retirement Systems Case Study
New York State Teachers' Retirement Systems (NYSTRS)

FACT SHEET

NYSTRS is the second-largest public retirement system in the state and one of the 10-largest systems in the nation. Eligible retirees are guaranteed a monthly benefit payment for life. NYSTRS administers a defined benefit plan that provides retirement, disability and death benefits to eligible New York State public school teachers and administrators. Eligibility for these benefits depends on factors such as a member's tier of membership, age, earnings and service credit.

The Retirement System was established in 1921 by the New York State Legislature, and our benefits are paid in accordance with the laws enacted by the Legislature.

Number of Systems/programs Administered: 1 system with 5 tier levels

System members are organized using a tier structure based on date of membership. There are five tiers, each with different benefit structures and eligibility rules.

Tier 1: Membership prior to 7/1/73

Tier 2: Membership 7/1/73 — 7/26/76

Tier 3: Membership 7/27/76 — 8/31/83

Tier 4: Membership 9/1/83 — 12/31/09

Tier 5: Membership on or after 1/1/10

Membership Size: 427,000

Active: 280,000

retirees and beneficiaries: 147,000

Hours of operation:

8:30 – 4:15 for most of the year

In the summer: 8:00 – 4:15 Monday through Thursday, and 8:00 – 12:30 on Fridays

Number of staff in Call and Visitor Center: 29

(Information & Communication Center staffing breakdown below)

Number of part-time staff/benefits, if utilized: NONE

Levels of positions for the Information & Communication Center Staff:

Department Manager----(1)

Administrative Assistants---(2) \$51,268 to \$65,190

(Supervisory) Information Representative 3 level---(1) \$66,375 to \$83,954

(Supervisory) Information Representative 2 level---(3) \$56,813 to \$72,076

Information Representative 2 level----(22) \$51,268 to \$65,190

22 Information Representatives: 3 supervisory personnel at the Information Representative 2 level: 1 supervisor at the Information Representative 3 level: a department manager: and two administrative assistants

The 22 Information Representatives are responsible for answering phone and email inquiries, providing benefits consultations in our offices to members with appointments or who drop in, providing video consultations to members at other sites, traveling to sites across the state to have benefits consultations with members, and deliver benefits presentations when requested across the state---They do it all according to the POC:

Required training time: 2 years

For traineeship for new Information Representatives (Classroom and Mentorship)

South Carolina Retirement Systems Case Study
New York State Teachers' Retirement Systems (NYSTRS)

Average number of calls/visits per day: Calls—385 (rounded) Visits: 28 (rounded)

Calls:----- 100,000
Consultations in house-----2,500
Video consultations-----3,500
Consultations at other site locations- -----1,200

Average turnover rate in positions: Extremely Low:

According to the POC, over the last ten years combined, the NYSTRS has had six staff move on to other jobs in the agency (almost all via promotions), two people retire, and two people leave the agency for external positions.

Specific method to retain experienced staff: No specifics provided

The POC indicated that the culture at NYSTRS is such that they have a low turnover rate across the board.

South Carolina Retirement Systems Customer Service Study
North Carolina Retirement Systems

FACT SHEET

This is the country's 10th largest public pension fund and was created in 1941 to provide benefits to all state employees and full-time teachers. The two largest components are the Teachers and State Employee's System and the Local Governmental Employees' System.

Number of Systems Administered: There are (4) major retirement systems covered in this Division to include the :

- Teachers' and State Employees Retirement System (TERS)
- Local Governmental Employees' Retirement System
- Consolidated Judicial Retirement System
- Legislative Retirement System

In addition to these retirement systems, the Division has the responsibility for administering programs that covers the Firemen's and Rescue Squad Workers Pension Fund, Disability Income Plan, National Guard Pension Plan, Supplemental Retirement Income Plan and the Register of Deeds Supplemental Pension Fund.

Membership Size: 850,000 public employees

Hours of operation: The Member Service Center is currently opened 8:00 a.m. – 5:30 p.m., Monday-Friday. However, they will soon change hours of operations to 8:00 a.m. – 5:00 p.m.

Number of staff in Call and Visitor Center: There are (27) staff in the Member Service Center. Eleven of the staff provide visitor consultations.

Number of part-time staff/benefits, if utilized: There are no part-time workers.

Levels of positions:

- Supervisor
- Team Leaders
- Subject Matter Experts
- Benefit Counselors....Entry level salary is \$28,000 - \$35,000.

Required training time: A Counselor's training time is one month.

Average number of calls/visits per day: The average number of calls received per month is 25,000, (1100 plus per day). There are approximately (100) visits per month with appointment and walk-ins accepted.. Appointments and walk-ins are accepted.

Average turnover rate in positions: Experienced very little turnover within the last year....not exactly sure why.

Specific method to retain experienced staff: No specific retention plan cited.

FACT SHEET

The South Carolina Public Employee Benefit Authority (PEBA) administers five defined benefit pension plans and one defined contribution retirement plan. A defined benefit plan is a retirement plan in which contributions are made to fund a level of retirement income at a future retirement date. Specified monthly service retirement benefits, as well as disability benefits and death benefits are provided to eligible members and/or their surviving beneficiaries. The plans' terms specify the amount of pension benefits to be provided at a future date or after a certain period of time. The benefit amount specified is a function of a formula based on years of service, compensation, and age. The Retirement Systems also provides a defined contribution retirement plan (the State Optional Retirement Program) which is an alternative to membership in the traditional defined benefit plan.

Number of Systems/Programs Administered: 6

- The South Carolina Retirement System (SCRS) established July 1, 1945
- The Police Officers Retirement System (PORS) established July 1, 1962
- The Retirement System for Members of the General Assembly of the State of South Carolina (GARS) was established January 1, 1966
- The Retirement System for Judges and Solicitors of the State of South Carolina (JSRS) was established July 1, 1979
- The National Guard Retirement System (NGRS) was established July 1, 1975
- State Optional Retirement Program

Membership Size: 530,446 as of June 30, 2012

Total Membership	PEBS SCRS	PEBA PORS	PEBA GARS	PEBA JSRS	NG
Active	185,817	26,184	170	144	12,097
Inactive	150,959	10,892	56	3	2,443
Retirees & Beneficiaries ²	<u>121,943</u>	<u>14,758</u>	<u>346</u>	<u>202</u>	<u>4,420</u>
	458,719	51,834	584	349	18,960

Hours of operation:

Core Hours: 8:30 am to 5:00 pm Customer Service Visitor Center and most Call Center Staff---
-a partial Call Center staff works from 8:45 am to 5:15 pm to answer any late calls remaining in telephone queue

Number of staff in Call and Visitor Center: 32 not counting 3 vacancies

The **Call Center** is staffed with 2 Program Managers, 3 Benefit Managers, 16 of 19 Benefit Counselors of which the center is short 3 counselors.

The **Visitors Center** is staffed with 2 Program Managers, 8 Benefit Counselors and 1 Receptionist, and 1 Assistant Directors (Manager of both centers)

Number of part-time staff/benefits, if utilized:

Only the Visitor Center Receptionist is part-time.

Public Employee Benefit Authority (PEBA)
SCRS Retirement Benefit

Levels of positions in the Call and Visitor Centers:

01	Assistant Director (PGM 3)	\$68,350 - \$126,458
04	Program Manager I	\$46,169 - \$85,417
11	Benefits Manager	\$37,945 - \$70,204
11	Benefit Counselor II	\$31,182 - \$57,695
04	Benefit Counselor I	\$25,627 - \$47,413
01	Receptionist (BCII position)	\$31,182 - \$57,695

Required training time:

Call Center---Person(s) hired as a Benefits Counselor I (entry level) and the initial training takes approximately two to three months with the possibility of extending the time for subject areas needing more training emphasis. Training is conducted individually and with a trainer. Refresher training is on-going. Takes an additional nine more months after the initial training period for a person to become totally effective in responding to questions asked by phone

Visitors Center: When a Counselor has reached the Benefits Manager level, training is continued based on self-taught and supervisory training classes.

Average number of calls/visits per day: Data as of 6/30/12

Calls—Fiscal Year 2012-----**164,693** Daily:----**667 (rounded)**
Visitors—Fiscal Year 2012-----**17,358** Daily:-----**70 (rounded)**

Average turnover rate in positions: Since January 2009, the Call Center has had a turnover in staff of 21 people and the Visitor Center 4 people. Of this 24, the Call Center is still Short 3

Call Center: Lost 5 to Other Agencies, 1-terminated, 2-resigned, 4 retired, 4 to other areas within this agency's Customer Service, 5 to other department within this agency

Visitors Center: Lost 4 to Retirement, replacements hired from within this agency—3 from the Call Center and 1 from another department from within this agency. No high turnover in this area

Specific method to retain experienced staff:

The Customer Service Department has no particular plan in place to retain experienced employees but we do offer a very family/friendly work environment, a continuance of on the job training, and an open door policy to all managers/supervisors.

South Carolina Retirement Systems Customer Service Study
Employees Retirement Systems of Texas (ERS)

FACT SHEET

Employees Retirement Systems of Texas – Administers programs that provide retirement, deferred compensation and flexible benefits for state employees, elected officials, law enforcement and custodial officers and judges.

Number of Systems Administered: (4) Plans...ERS, LECOSRF, Judicial System Plan I and Judicial System Plan II. ERS also manages the Employees Group Benefits Program which provides health care coverage to state employees, retirees and their families.

Membership Size: 222, 193 members and retirees; provides health care coverage under the Employees Group Benefits program to more than 500,00 state and higher education employees, retirees and their families.

Hours of operation: The Call Center hours are 7:30 a.m. – 5:30 p.m. Visitors are seen via appointment between 8:30 a.m. – 3:30 p.m. Walk-ins can start as early as 7:30 a.m. and the last walk-in is at 4:15 p.m.

Number of staff in Call and Visitor Center: Typically new hires start in Insurance and move to Retirement, so counselors are multi-skilled and can support both areas if necessary. Currently, there are (11) Retirement counselors (with 5 in training). All employees are full-time. When assistance is needed, there are approximately (10) additional employees in different functional areas of Customer Benefits that can assist with calls or visitors. These are employees who were once in this department and have moved on to different roles.

Number of part-time staff/benefits, if utilized: Currently, ERS does not have any existing part-time staff. At one time, they tried part-time staff, but it became too difficult for them to stay current with information.

Levels of positions: Retirement Specialist I, II, and III.

Required training time: Initial training is (3-4) weeks long, and escalation to higher levels is based on on-the-job training.

Average number of calls/visits per day: Average number of calls per day can range from (150-250) depending on the time of year. The average number of visits can run from (12-25). Average handling time for a call runs from (8-20) minutes depending on the type of inquiry. Visits tend to be longer, running on average of (40) minutes. Specific to the Retirement group, volumes frequently escalate during legislative sessions (before decisions are made) as well as when media reporting creates uncertainty that is concerning to members.

Average turnover rate in positions: The turnover rate within the entire group averages less than 10% per year; however, that is inclusive of transfers to other departments. They do not typically have voluntary turnover within the Retirement area.

Specific method to retain experienced staff: Retention is achieved via recognition, promotional and project work.

Carol Chapnek – Customer Service Manager- (512) 867-7118

FACT SHEET

The Virginia Retirement System administers a defined benefit plan, a group life insurance plan, a deferred compensation plan and a cash match plan for Virginia's public sector employees, as well as an optional retirement plan for selected employees and the Virginia Sickness and Disability Program for state employees. The system is headquartered in Richmond, Virginia.

Number of Systems/Programs Administered: 5

Virginia Retirement System Plan 1 and Plan 2
State Police Officers Retirement System
Virginia Law Officers Retirement
Judicial Retirement System

Membership Size as of 6/30/2011: Approximately 600,972

339,740 Active members
105,067 Inactive and Deferred members
156,165 Retirees and Beneficiaries

Hours of operation:

Call Center: 8:30 am to 5 pm
Retirement Counseling Center: 8:30 am to 4 pm

Number of staff in Call and Visitor Center: Total of 55

Total staff is **55 agents of which 38 are full time**. All senior level agents service the walk-in retirement counseling center on a rotation basis. Virginia Retirement System has 5 visitor workstations (4 for active members and 1 for retirees)

Number of part-time staff/benefits, if utilized: 17 Part time agents.

Their system has a mixture of part time wage agents on the payroll and contract agents through a temp agency. The outside agency is a temp to hire contract to recruit qualified agents on a part-time basis for 3-9 months on a trial basis before placing them on the agency's payroll. The point of contact indicated that the customer service area could not achieve its' daily service levels without having a contingent reserve of part time staff. The specific time of the year the part-time employees are needed and utilized the most is from January –August; however, they have them all year round.

South Carolina Retirement Systems Case Study
Virginia Retirement Systems

Levels of positions:

There levels of staff positions are comprised of:

Retiree counseling specialists I, II, III

Member Counseling Specialists I, II, III, IV

Employer Advisors III, IV

SALARY RANGE:

	Minimum	Midpoint	Maximum
Level 1	\$31,127	\$42,956	\$54,784
Level 2	\$34,240	\$47,251	\$60,262
Level 3	\$37,664	\$51,976	\$66,289
Level 4	\$41,430	\$57,174	\$72,910

Required training time:

2 weeks head start orientation in the business unit and then **6 weeks** in the classroom. After completing the classroom training, they practice with a mentor for **two weeks** before being released to take calls on their own. The quality team and supervisors monitor their calls heavy the **first few months** out of class.

Average number of calls/visits per day:

700 –1000 calls per day depending on the time of week

8-10 visitor walk-ins per day

Average turnover rate in positions:

Low turnover, about 2%-5% a year due mainly to the career progression program we have instituted

Specific method to retain experienced staff:

Virginia Retirement System created a career progression program in 2009 and added multiple levels to each main customer touch point/skill path. The program provides for an in-grade adjustment quarterly (2%-6%) for learning and acquiring new knowledge /skills. The program also offers the opportunity for promotion within or across a skill level (6-10% raise)

Point of Contact: Deardrian Carver, Chief Customer Relations Officer, 888-827-3847 (x)3148

South Carolina Retirement Systems Case Study
Washington State Department of Retirement Systems (DRS)

FACT SHEET

In the 1930s and 1940s, retirement systems were created for the state's public employees, teachers, judges, law enforcement officers and fire fighters. Each was independently administered until 1976, when the Legislature created the Department of Retirement Systems (DRS) to serve as the administrator over all public retirement systems. The state of Washington, through DRS, administers 8 retirement systems for public employees of the state and political subdivisions: the Public Employees' Retirement System, the School Employees' Retirement System, the Public Safety Employees' Retirement System, the Teachers' Retirement System, the Law Enforcement Officers' and Fire Fighters' Retirement System, the Washington State Patrol Retirement System, the Judicial Retirement System, and the Judges' Retirement Fund. In 1996, administration of the state's Deferred Compensation and Dependent Care programs (for eligible public employees) was transferred to DRS. Legislation in 2008 transferred the administration of DCAP to the Health Care Authority (HCA), effective January 1, 2009.

Number of Systems/Programs Administered: 8 systems and 1 program

Public Employees' Retirement System (PERS)
Teachers' Retirement System (TRS)
School Employees' Retirement System (SERS)
Law Enforcement Officers' and Fire Fighters' Retirement System (LEOFF)
Washington State Patrol Retirement System (WSPRS)
Public Safety Employees' Retirement System (PSERS)
Judges' Retirement Fund (JRF)
Judicial Retirement System (JRS)

Deferred Compensation Program (DCP)

Membership Size: 479,481 as of June 2010 (latest actuarial valuation date)

Active:	103,568
In-Active:	194,000
Terminated:	48,417
Retirees and Beneficiaries:	133,496

Hours of operation:
8:00 a.m. to 5:00 p.m.

Number of staff in Call and Visitor Center: 87

Currently, we do not have a Call Center. DRS is looking at a possible organizational restructure which would include a Contact/Call center in the near future. DRS has a Central Reception Unit (CRU) that is staffed by Customer Service Specialists. A Customer Service Specialist 4 (Team Leader) and 3 Customer Service Specialist 2 team members at the front desk as first point of contact for the members, and 3 Customer Service Specialist 2 team members in the back office. DRS also has approximately 80 Retirement Service Analysts (RSAs) who, along with members of CRU, staff their phones and meet with walk-in members.

South Carolina Retirement Systems Case Study
Washington State Department of Retirement Systems (DRS)

Number of part-time staff/benefits, if utilized: 2

No part-time employees in Central Reception Unit (CRU). However, we do have 2 part time Retirement Service Analysts (RSAs) s and they receive benefits.

1 RSA works 10am-2pm daily

1 works 3 days a week

Levels of positions:

Customer Reception Unit:

Customer Service Specialist 4 (the Team Leader) 1 position

\$33,228 to \$43,368

Customer Service Specialist 2 6 positions

\$28,440 to \$35,652

Retirement Service Analysts (RSAs) teams:

Team Leader (RSA 4)

\$39,312 to \$51,552

Lead Worker or Content Expert (RSA 3)

\$36,492 to \$47,892

and RSA 2s

\$33,984 to \$44,448

Required training time: 3 to 9 months depending on position hired into.

In CRU, approximately 3-5 months.

RSA 2s go through a 6-9 month training program.

Average number of calls/visits per day: Call—866 rounded: Visitors: 28

Total CALLS in 2011:

225,000 phone calls in 2011. CRU generally answers about 40% of calls, with RSAs answering the rest.

Total # VISITORS in 2011:

7,165 walk-in visits

Average turnover rate in positions: 13%

13% (counting all eight positions and permanent turnover only)

Specific method to retain experienced staff:

DRS uses a team philosophy which promotes a collaborative and supportive work environment.

They focus on providing learning and growth opportunities for team members that include participating in projects which gives them the opportunity to provide input and add value to the process; participating in Developmental Job Assignments to gain a better understanding of different positions in the agency; or participating in on-going training.

DRS encourages team members to bring their suggestions forward on a system called “IdeaScale.”

The ideas are then reviewed and if possible implemented. Since the inception of IdeaScale seven months ago, they have had 114 ideas posted, 19 completed, 15 in progress and 14 in review.

Their Leadership philosophy is an “inverted pyramid” with the leader on the bottom providing the resources for the team to accomplish the mission of a satisfied customer.

Point Of Contact: Chatreese Beckett; Central Reception Unit Manager; 1-800-547-6657

Appendix D

PEBA's Customer Service Survey Questions

CPM Project for Class 2013
Customer Service Call Center/Customer Intake Retention Survey

Please rate the following statements on a scale of 1 to 4, where 1 = Strongly Disagree and 4 = Strongly Agree	Strongly Disagree 1	Disagree 2	Agree 3	Strongly Agree 4
01. I feel that I am an important member of this organization.	1	2	3	4
02. I feel that I am an important member of my work team.	1	2	3	4
03. I am clear on the scope and responsibilities of my job.	1	2	3	4
04. The amount of stress I am under negatively impacts my performance	1	2	3	4
05. I know what the people I work with expect of me.	1	2	3	4
06. I feel the policies, rules, procedures, and regulations of the organization that affect my job are clearly defined	1	2	3	4
07. My organization hires people who are qualified to do their jobs	1	2	3	4
08. My supervisor communicates effectively with us	1	2	3	4
09. I feel I am fairly compensated for my work.	1	2	3	4
10. I am aware of opportunities for advancement or promotion that exist for me.	1	2	3	4
11. The benefits I receive are an incentive to remain employed by state government	1	2	3	4
12. I would turn down a job at a comparable pay and prospects in another organization to stay with this organization	1	2	3	4
13. I am given adequate training to do my job	1	2	3	4
14. My employer really shows this organization cares about its employees	1	2	3	4
15. My supervisor and I have a good work related relationship	1	2	3	4
16. You are satisfied with your job	1	2	3	4
17. I believe we have open communication between personnel and leadership in this organization	1	2	3	4

CPM Project for Class 2013
Customer Service Call Center/Customer Intake Retention Survey

Rate these factors based on importance to you	Not at All Important	Not Very Important	Neutral	Some What Important	Very Important
Your pay					
Your benefits					
Your Relationship with Co-Workers					
Your Relationship with your Supervisor					
The Quality of Supervision you receive					
The commitment of Organizational leadership					
Your opportunity for growth and advancement					
Your personal commitment to the work you do					

other: Please explain.

18. Is there anything in particular about this organization that makes you feel proud to be an employee here?

19. If you could change one thing that you think would have the greatest impact on improving retention, what would it be?

20. Are the reasons you are staying with State government different than the reasons why you first came to State government? Yes _____ No _____
Explain.

21. As you think to the future, which of the following best describes your career plans at this time?

- ____ Retire or leave State employment within 1-2 years
- ____ Retire or leave State employment within 3-5 years
- ____ Retire or leave State employment within 6-10 years
- ____ No plans to retire or leave State employment in the foreseeable future

Appendix E

Chart—Summary of Retirement Systems by Member Size/Work Hours

CPM PROJECT--CLASS 2013

Survey Information Summary of Retirement Systems by Member Size/Work Hours

Retirement Systems	Number Systems admin	Membership Size	Hours of operation	Retirement Systems	Number Systems admin	Membership Size	Hours of operation
California State Teachers' Retirement System (CalSTRS)	3	862,192	8:00 am to 5:00 pm	Teacher Retirement System of Georgia (TRS)	1	394,000	8:00 am to 5:00 pm CC & 8:30 to 4:30 pm VC
North Carolina Retirement System (NCRS)	4	850,000	8:00 am to 5:00 pm	Alabama Employees' Retirement System (ERS)	3	373,209	8:00 am to 5:00 pm CC & 8:30 to 4:30 pm VC
Virginia Retirement System (VRS)	5	600,972	8:30 am to 5:00 pm	Iowa Public Employees, Retirement System (IPERS)	1	328,975	7:30 am - 5:00 pm CC 8:00 am - 4:30 pm VC Monday - Friday
Arizona State Retirement Systems (ASRS)	5	538,776	8:00 am to 5:00 pm	Illinois Municipal Retirement Fund (IMRF)	3	275,528	7:30 am to 5:30 pm CC & 8:30 am to 4:30 pm VC
South Carolina Public Employee Benefit Authority (PEBA Retirement Benefits)	6	530,446	8:30 am to 5:00 pm Core hours VC & CC & 8:45 am to 5:15 pm CC partial staff for late calls	Employees Retirement System of Texas (ERS)	4	222,000	7:30 am to 5:30 pm
Indiana Public Employees Retirement Fund (PERF)	6	500,000	8:00 am to 8:00 pm by outside vendor (Tier 1) & 8:00 to 5:00 pm Public agency VC (Tier 2)	Louisiana State Employees' Retirement System (LASERS)	1	152,725	8:00 am to 4:30 pm
Washington State Department of Retirement System (DRS)	8 Sys and 1 program	479,481	8:00 am to 5:00 pm	Missouri State Employees' Retirement System (MOSERS)	4	105,617	7:30 am to 4:30 pm
New York State Teachers' Retirement Systems (NYSTRS)	1	427,000	8:30 am to 4:15 pm (Summer--8:00 am -4:15 Mo-Th & 800 - 12-30 Fridays)				

Appendix F

Chart—Retirement Systems Staff Availability for Calls

Survey Information Summary of Retirement Systems
Staff Available for Calls

Retirement Systems	Number Systems admin	Membership Size	Avg calls per day	Staff available for calls	Avg calls per Staff member per day	PT	Avg Visitors per day	Staff available for VISITORS	Avg visitors per Staff member per day
Washington State Department of Retirement System (DRS)	8 Sys and 1 program	479,481	866	87	10	X2	28	87	1
Virginia Retirement System (VRS)	5	600,972	1000	52	19	X17	10	5	2
California State Teachers' Retirement System (CalSTRS)	3	862,192	1228	50	25	X3	50	13	4
Arizona State Retirement Systems (ASRS)	5	538,776	520	40	13	X4	70	10	7
North Carolina Retirement System (NCRS)	4	850,000	1100	27	41		100	11	9
Iowa Public Employees, Retirement System (IPERS)	1	328,975	375	26	14		15	26	1
Teacher Retirement System of Georgia (TRS)	1	394,000	350	26	13		18	13	1
Illinois Municipal Retirement Fund (IMRF)	3	275,528	600	23	26		18	8	2
New York State Teachers' Retirement Systems (NYSTRS)	1	427,000	385	22	18		28	22	1
Alabama Employees' Retirement System (ERS)	3	373,209	80	22	4	X	20	3	7
South Carolina Public Employee Benefit Authority (PEBA Retirement Benefits)	6	530,446	667	21	32	X1	70	11	7 rd
Indiana Public Employees Retirement Fund (PERF)	6	500,000	400	20	20		30	5	6
Employees Retirement System of Texas (ERS)	4	222,000	250	11	23		25	11	2
Louisiana State Employees' Retirement System (LASERS)	1	152,725	200	7	29		40	7	6
Missouri State Employees' Retirement System (MOSERS)	4	105,617	124	7	18		15	7	2

Appendix G

Chart---Staff Member Availability to Every 10K
Members of Each System

Survey Information Summary of Membership Size
Staff Member Availability to Every 10K Members of Each System

Retirement Systems	Membership Size	10K Members	Total projected Staff Needed per 10K Members	Total Available Staff per Survey	Staff Available per 10K Members
California State Teachers' Retirement System (CalSTRS)	862,192	10,000	86	63	0.73
North Carolina Retirement System (NCRS)	850,000	10,000	85	27	0.32
Virginia Retirement System (VRS)	600,972	10,000	60	55	0.92
Arizona State Retirement Systems (ASRS)	538,776	10,000	54	50	0.93
South Carolina Public Employee Benefit Authority (PEBA Retirement Benefits)	530,446	10,000	53	32	0.60
Indiana Public Employees Retirement Fund (PERF)	500,000	10,000	50	25	0.50
Washington State Department of Retirement System (DRS)	479,481	10,000	48	87	1.81
New York State Teachers' Retirement Systems (NYSTRS)	427,000	10,000	43	29	0.68
Teacher Retirement System of Georgia (TRS)	394,000	10,000	39	26	0.66
Alabama Employees' Retirement System (ERS)	373,209	10,000	37	25	0.67
Iowa Public Employees, Retirement System (IPERS)	328,975	10,000	33	26	0.79
Illinois Municipal Retirement Fund (IMRF)	275,528	10,000	28	23	0.83
Employees Retirement System of Texas (ERS)	222,000	10,000	22	21	0.95
Louisiana State Employees' Retirement System (LASERS)	152,725	10,000	15	13	0.85
Missouri State Employees' Retirement System (MOSERS)	105,617	10,000	11	7	0.66

Appendix H

Chart—Retirement Systems Average Call Center Calls per Day

Survey Information Summary of Retirement Systems
Average Call Center Calls per Day

Retirement Systems	Number Systems admin	Membership Size	Hours of operation	# Full Time Call/Visitor Center Staff	# Part-Time Staff	Avg calls per day	Avg Visitors per day	Retention Methods
California State Teachers' Retirement System (CalSTRS)	3	862,192	8:00 am to 5:00 pm Aptmt only on Saturdays	63 Visitor Ctr 40-50 Call Ctr 13	2-3 days a wk peak time only	1228	50	Yes See Fact Sheet
North Carolina Retirement System (NCRS)	4	850,000	8:00 am to 5:00 pm	27 all staff takes calls but 11 see visitors	0	1100	100	No
Virginia Retirement System (VRS)	5	600,972	8:30 am to 5:00 pm	38 Call Center (35) (5) Visitors' Area	17	1000	10	Yes See Fact Sheet
Washington State Department of Retirement System (DRS)	8 Sys and 1 program	479,481	8:00 am to 5:00 pm	85 no Call Center--all staff answer calls and see visitors	2	866	28	Yes See Fact Sheet
South Carolina Public Employee Benefit Authority (PEBA Retirement Benefits)	6	530,446	8:30 am to 5:00 pm Core hours VC & CC & 8:45 am to 5:15 pm CC partial staff for late calls	---31--- out of 24 staff in call center (3 short) E8 10 full staff visitor	1 ft desk receptionist visitor center	667	70	No
Illinois Municipal Retirement Fund (IMRF)	3	275,528	7:30 am to 5:30 pm CC & 8:30 am to 4:30 pm VC	23 Call Ctrs (1)--8 mem (2)--15 mem Two	0	600	18	No
Arizona State Retirement Systems (ASRS)	5	538,776	8:00 am to 5:00 pm	46 Call Center 10 Aptmt Center 36	4	520	70	No
Indiana Public Employees Retirement Fund (PERF)	6	500,000	8:00 am to 8:00 pm by outside vendor (Tier 1) & 8:00 to 5:00 pm Public agency VC (Tier 2)	25 Tier (2) Public agency (18-20) Call center (5) visitor center	0	400	30	No

Survey Information Summary of Retirement Systems
Average Call Center Calls per Day

Retirement Systems	Number Systems admin	Membership Size	Hours of operation	# Full Time Call/Visitor Center Staff	# Part-Time Staff	Avg calls per day	Avg Visitors per day	Retention Methods
New York State Teachers' Retirement Systems (NYSTRS)	1	427,000	8:30 am to 4:15 pm (Summer--8:00 am - 4:15 Mo-Th & 800 - 12:30 Fridays)	29 (22 counselors, 5 supervisors, & 2 admin)	0	385	28	Yes See Fact Sheet
Iowa Public Employees, Retirement System (IPERS)	1	328,975	7:30 am - 5:00 pm CC 8:00 am - 4:30 pm VC Monday - Friday	26 same staff see visitors and take calls	0	375	15	No
Teacher Retirement System of Georgia (TRS)	1	394,000	8:00 am to 5:00 pm CC & 8:30 to 4:30 pm VC	26 13 Visitor Ctr 11-21 Call Ctr	0	350	18	Yes See Fact Sheet
Employees Retirement System of Texas (ERS)	4	222,000	7:30 am to 5:30 pm	(11 primary counselors and 10 secondary)	0	250	25	Yes See Fact Sheet
Louisiana State Employees' Retirement System (LASERS)	1	152,725	8:00 am to 4:30 pm	13 (7) take calls/visitors (3) assist Fid Svcs (1) sup & (2) Receptionists	0	200	40	No
Missouri State Employees' Retirement System (MOSERS)	4	105,617	7:30 am to 4:30 pm	7 No call center--all staff (calls and see visitors)	0	124	15	Yes See Fact Sheet
Alabama Employees' Retirement System (ERS)	3	373,209	8:00 am to 5:00 pm CC & 8:30 to 4:30 pm VC	25 (22) Call Center (3) Visitor Area (Contact Center)	summer interns w/no benefit	80	20	No

Appendix I

Chart—Retirement Systems Average Visitor Center Visitors per Day

Survey Information Summary of Retirement Systems
Average Visitor Center Visitors per Day

Retirement Systems	Number Systems admin	Membership Size	Hours of operation	# Full Time Call/Visitor Center Staff	# Part-Time Staff	Avg calls per day	Avg Visitors per day	Retention Methods
North Carolina Retirement System (NCRS)	4	850,000	8:00 am to 5:00 pm	27 all staff takes calls but 11 see visitors	0	1100	100	No
Arizona State Retirement Systems (ASRS)	5	538,776	8:00 am to 5:00 pm	46 36 Call Center 10 Aptmt Center	4	520	70	No
South Carolina Public Employee Benefit Authority (PEBA Retirement Benefits)	6	530,446	8:30 am to 5:00 pm Core hours VC & CC & 8:45 am to 5:15 pm CC partial staff for late calls	---31--- 21 out of 24 staff in call center (3 short) 10 full staff visitor center	1 ft desk receptionist visitor center	667	70	No
California State Teachers' Retirement System (CalSTRS)	3	856,360	8:00 am to 5:00 pm	63 13 Visitor Ctr 40-50 Call Ctr	2-3 days a wk peak time only	1228	50	Yes See Fact Sheet
Louisiana State Employees' Retirement System (LASERS)	1	152,725	8:00 am to 4:30 pm	13 (7) take calls/visitors (3) assist Fid Svcs (1) sup & (2) Receptionists	0	200	40	No
Indiana Public Employees Retirement Fund (PERF)	6	500,000	8:00 am to 8:00 pm by outside vendor (Tier 1) & 8:00 to 5:00 pm Public agency VC (Tier 2)	25 Tier (2) Public agency (18-20) Call center (5) visitor center	0	400	30	No
Washington State Department of Retirement System (DRS)	8 Sys and 1 program	479,481	8:00 am to 5:00 pm	85 no Call Center--all staff answer calls and see visitors	2	866	28	Yes See Fact Sheet

Survey Information Summary of Retirement Systems
Average Visitor Center Visitors per Day

Retirement Systems	Number Systems admin	Membership Size	Hours of operation	# Full Time Call/Visitor Center Staff	# Part-Time Staff	Avg calls per day	Avg Visitors per day	Retention Methods
New York State Teachers' Retirement Systems (NYSTRS)	1	427,000	8:30 am to 4:15 pm (Summer--8:00 am - 4:15 Mo-Th & 800 - 12:30 Fridays)	29 (22 counselors, 5 supervisors, & 2 admin	0	385	28	Yes See Fact Sheet
Employees Retirement System of Texas (ERS)	4	222,000	7:30 am to 5:30 pm	11-21 (11 primary counselors and 10 secondary)	0	250	25	Yes See Fact Sheet
Iowa Public Employees, Retirement System (IPERS)	3	373,209	8:00 am to 5:00 pm CC & 8:30 to 4:30 pm VC	25 (22) Call Center (3) Visitor Area (Contact Center)	summer interns w/no benefit	80	20	No
Teacher Retirement System of Georgia (TRS)	1	394,000	8:00 am to 5:00 pm CC & 8:30 to 4:30 pm VC	26 13 Visitor Ctr 13 Call Ctr	0	350	18	Yes See Fact Sheet
Illinois Municipal Retirement Fund (IMRF)	3	275,528	7:30 am to 5:30 pm CC & 8:30 am to 4:30 pm VC	23 Two Call Ctrs (1)-8 mem (2)-15 mem	0	600	18	No
Alabama Employees' Retirement System (ERS)	1	328,975	7:30 am - 5:00 pm CC 8:00 am - 4:30 pm VC Monday - Friday	26 same staff see visitors and take calls	0	375	15	No
Missouri State Employees' Retirement System (MOSERS)	4	105,617	7:30 am to 4:30 pm	7 No call center--all staff (calls and see visitors)	0	124	15	Yes See Fact Sheet
Virginia Retirement System (VRS)	5	600,972	8:30 am to 5:00 pm	38 (35) Call Center (5) Visitors' Area	17	1000	10	Yes See Fact Sheet

Appendix I

Appendix J

Retirement Systems Employee Turn-Over Rate Experience

and

PEBA-CS Organizational Chart and Call Center Staff Loses

CPM PROJECT---CLASS 2013
Retirement Systems Employee Turn Over Rate Experience

Alabama Employees' Retirement System (ERSAL)

Average turnover rate in positions: Turnover generally 3-5 years.

Arizona State Retirement System (ASRS)

Average turnover rate in positions: Tenure is generally one and half years.

California State Teachers Retirement System (CALSTRS)

Average turnover rate in positions: Does not experience a lot of turnover.

Georgia, Teachers Retirement System of (TRSGA)

Average turnover rate in positions: Turnover rate is minimal for both areas.

Illinois Municipal Retirement Fund (IMRF)

Average turnover rate in positions: Experience very little turnover

Indiana Public Employees' Retirement Fund (PERF)

Average turnover rate in positions: Have experienced recent turnover.

Iowa Public Employees' Retirement System (IPERS)

Average turnover rate in positions: No turnover to speak of, only retirements.

Louisiana State Employees' Retirement System (LASERS)

Average turnover rate in positions: LASERS does not experience a high degree of turnover. Have people retiring from the Member Service Center.

Missouri State Employees' Retirement System (MOSERS)

Average turnover rate in positions: Experience very little turnover

New York State Teachers Retirement System (NYSTRS)

Average turnover rate in positions: Extremely Low: According to the POC, over the last ten years combined, the NYSTRS has had six staff move on to other jobs in the agency (almost all via promotions), two people retire, and two people leave the agency for external positions.

North Carolina Retirement System (NCRS)

Average turnover rate in positions: Experienced very little turnover within the last year

South Carolina Public Employee Benefit Authority (PEBA)

Average turnover rate in positions: Since January 2009, the Call Center has had a 96% turnover in staff. **Visitors Center:** 33% turnover in staff with all positions filled.

Texas, Employees' State Retirement of (ERS)

Average turnover rate in positions: The turnover rate within the entire group averages less than 10% per year; however, that is inclusive of transfers to other departments. They do not typically have voluntary turnover within the Retirement area.

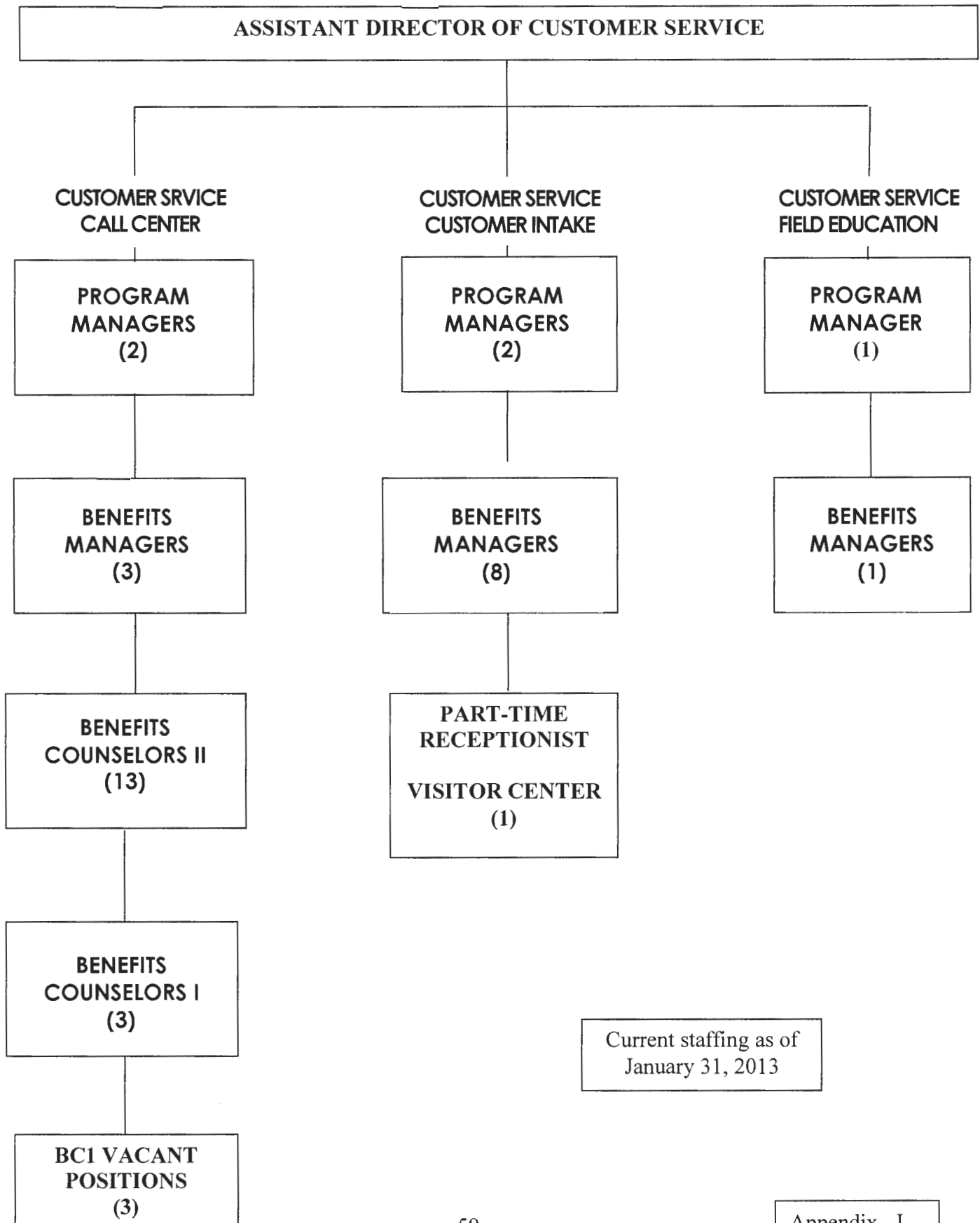
Virginia Retirement System (VRS)

Average turnover rate in positions: Low turnover, about 2%-5% a year due mainly to the career progression program we have instituted

Washington State Department of Retirement System (WA DRS)

Average turnover rate in positions: 13% (counting all eight positions and permanent turnover only)

CUSTOMER SERVICE DEPARTMENT ORGANIZATIONAL CHART



CPM PROJECT--CLASS 2013
CALL AND VISITORS CENTERS
STAFF TURNOVERS SINCE JANUARY 2009

	SCPEBA DEPT		AGENCY OR DEPT LOSS TO	CC/CI	CC		
	CC		OSA				
	CC		OSA				
	CC		OSA				
	CC		OSA				
	CC		OSA	5	5		
	CC		OTHER REASONS	1	1		
	CC		RESIGNED				
	CC		RESIGNED	2	2		
	CC		RET				
	CC		RET				
	CC		RET				
	CC		RET	4	4		
	CC		TOACS				
	CC		TOACS				
	CC		TOACS				
	CC		TOACS	4	4		
	CC		TOD				
	CC		TOD				
	CC		TOD				
	CC		TOD				
	CC		TOD	5	5		
	CI		RET		21	Total loss CC	
	CI		RET				
	CI		RET				
	CI		RET	4	Total loss CI		
				25	Total loss CC & CI		
	CC--CALL CENTER						
	-CUSTOMER INTAKE VISITOR CENTER						
	DEPT--Department						
	OSA--OTHER STATE AGENCIES						
	RET--RETIRED						
	-TO OTHER AREAS IN CUSTOMER SERVICE						
	OTHER DEPARTMENTS WITHIN THE AGENCY						

Appendix K

Chart—Average # Calls per Day per Staff Member

Survey Information Summary of Retirement Systems
Average Calls Per Day Per Staff Member

Retirement Systems	Number Systems admin	Membership Size	Avg calls per day	Staff available for calls	Avg calls per Staff member per day	PT	Avg Visitors per day	Staff available for VISITORS	Avg visitors per Staff member per day
North Carolina Retirement System (NCRS)	4	850,000	1100	27	41		100	11	9
South Carolina Public Employee Benefit Authority (PEBA Retirement Benefits)	6	530,446	667	21	32	X1	70	11	7 rd
Louisiana State Employees' Retirement System (LASERS)	1	152,725	200	7	29		40	7	6
Illinois Municipal Retirement Fund (IMRF)	3	275,528	600	23	26		18	8	2
California State Teachers' Retirement System (CalSTRS)	3	862,192	1228	50	25	X3	50	13	4
Employees Retirement System of Texas (ERS)	4	222,000	250	11	23		25	11	2
Indiana Public Employees Retirement Fund (PERF)	6	500,000	400	20	20		30	5	6
Virginia Retirement System (VRS)	5	600,972	1000	52	19	X17	10	5	2
Missouri State Employees' Retirement System (MOSEERS)	4	105,617	124	7	18		15	7	2
New York State Teachers' Retirement Systems (NYSTRS)	1	427,000	385	22	18		28	22	1
Iowa Public Employees, Retirement System (IPERS)	1	328,975	375	26	14		15	26	1
Teacher Retirement System of Georgia (TRS)	1	394,000	350	26	13		18	13	1
Arizona State Retirement Systems (ASRS)	5	538,776	520	40	13	X4	70	10	7
Washington State Department of Retirement System (DRS)	8 Sys and 1 program	479,481	866	87	10	X2	28	87	1
Alabama Employees' Retirement System (ERS)	3	373,209	80	22	4	X	20	3	7

Appendix L

Chart—Average # Visitors per Day per Staff Member

Survey Information Summary of Retirement Systems
Average # Visitors Per Day Per Staff Member

Retirement Systems	Number Systems admin	Membership Size	Avg calls per day	Staff available for calls	Avg calls per Staff member per day	PT	Avg Visitors per day	Staff available for VISITORS	Avg visitors per Staff member per day
North Carolina Retirement System (NCRS)	4	850,000	1100	27	41		100	11	9
Arizona State Retirement Systems (ASRS)	5	538,776	520	40	13	X4	70	10	7
Alabama Employees' Retirement System (ERS)	3	373,209	80	22	4	X	20	3	7
South Carolina Public Employee Benefit Authority (PEBA Retirement Benefits)	6	530,446	667	21	32	X1	70	11	7 rd
Indiana Public Employees Retirement Fund (PERF)	6	500,000	400	20	20		30	5	6
Louisiana State Employees' Retirement System (LASERS)	1	152,725	200	7	29		40	7	6
California State Teachers' Retirement System (CalSTRS)	3	862,192	1228	50	25	X3	50	13	4
Employees Retirement System of Texas (ERS)	4	222,000	250	11	23		25	11	2
Illinois Municipal Retirement Fund (IMRF)	3	275,528	600	23	26		18	8	2
Missouri State Employees' Retirement System (MOSERS)	4	105,617	124	7	18		15	7	2
Virginia Retirement System (VRS)	5	600,972	1000	52	19	X17	10	5	2
Teacher Retirement System of Georgia (TRS)	1	394,000	350	26	13		18	13	1
New York State Teachers' Retirement Systems (NYSTRS)	1	427,000	385	22	18		28	22	1
Washington State Department of Retirement System (DRS)	8 Sys and 1 program	479,481	866	87	10	X2	28	87	1
Iowa Public Employees, Retirement System (IPERS)	1	328,975	375	26	14		15	26	1

Appendix M

Retirement Systems Methods to Retain Experienced Staff

CPM PROJECT—CLASS 2013
Retirement Systems Methods to Retain Experienced Staff:

California State Teachers' Retirement System (CalSTRS) Their big focus is on core values and employee enrichment. They believe they have a Class A hotel environment that behaves more like a financial agency and find it is attractive to staff and others.

Teachers Retirement System of Georgia (GATRS) offers extensive training and a good benefits package.

Missouri State Employees' Retirement System (MOSERS) offers a good compensation and benefits package

New York State Teachers' Retirement Systems (NYSTRS) The POC indicated that the culture at NYSTRS is such that they have a low turnover rate across the board.

South Carolina Public Employee Benefit Authority (SCPEBA) The Customer Service Department has no particular plan in place to retain experienced employees but we do offer a very family/friendly work environment, a continuance of on the job training, and an open door policy to all managers/supervisors.

Employees Retirement Systems of Texas (ERS) Retention is achieved via recognition, promotional and project work.

Virginia Retirement System (VRS) Created a career progression program in 2009 and added multiple levels to each main customer touch point/skill path. The program provides for an in-grade adjustment quarterly (2%-6%) for learning and acquiring new knowledge /skills. The program also offers the opportunity for promotion within or across a skill level (6-10% raise)

Washington State Department of Retirement Systems (DRS) DRS uses a team philosophy which promotes a collaborative and supportive work environment. They focus on providing learning and growth opportunities for team members that include participating in projects which gives them the opportunity to provide input and add value to the process; participating in Developmental Job Assignments to gain a better understanding of different positions in the agency; or participating in on-going training.

DRS encourages team members to bring their suggestions forward on a system called "IdeaScale." The ideas are then reviewed and if possible implemented. Since the inception of IdeaScale seven months ago, they have had 114 ideas posted, 19 completed, 15 in progress and 14 in review.

Their Leadership philosophy is an "inverted pyramid" with the leader on the bottom providing the resources for the team to accomplish the mission of a satisfied customer.

Appendix N

SCRS Call and Visitors Centers Survey Executive Summary

CPM PROJECT CLASS 2013
CUSTOMER SERVICE—SURVEY EXECUTIVE SUMMARY

This survey was administered to 23 staff members (not including supervisors) of the SC Public Employee Benefit Authority Retirement Division (formally known as South Carolina Retirement Systems (SCRS) Call and Visitors Centers. The analysis of the survey responses are as follows:

Survey questions 1, 2, 3, 5, 6, 8, 13, 15, & 16 indicated that the majority of the staff agree they are very satisfied with the organization and their job, members of the team, job duties, know what is expected on a daily basis, satisfied with communication between staff and supervisors, the initial training and continuous training received on the job, and the working relationship they have with their supervisor.

Survey questions 4, 7, 10, 11, & 12, were fairly close in agreements and disagreements (plus or minus 2-3 leaning more on the disagreement side) that stress may or may not negatively impact their performance on the job, that the organization may or may not hire qualified people for the customer service call center jobs, and that staff may or may not be aware of advancement or promotion opportunities. 12 out of the 23 surveyed disagreed that benefits offered by the state was an incentive to remain employed in state government and 11 agreed the incentive was a good reason to remain employed with state government. Please note, over half the staff surveyed would not turn down comparable pay and prospective job with another agency if he or she had the opportunity to leave this agency.

Survey questions 9, 14, & 17 show the disagreement outweigh the agreement in the following areas: 14 of the 23 staff members feel they are not fairly compensated for their work, 14 of 23 feel the organization do not care about its employees and 14 of 23 feels there is no open communication between staff and leadership in this organization.

FACTORS: The majority of staff surveyed felt their pay, benefits, relationship with your supervisor, the quality of supervision received, commitment of organizational leadership, opportunities for growth and advancement were very important factors to them in the work place. The exception is 10 of 23 thought that a relationship with co-workers was somewhat important while 12 of 23 thought this relationship was very important, 1 person was neutral.

The staff was asked in question 18 if there were anything in particular about this organization that makes them feel proud to be an employee. The overall responses were positive where as the staff was proud to be part of an agency where the overall public opinion of PEBA is the quality of customer service and the professionalism exhibited on a consistent basis to our members while addressing their concerns is a service they have never experience before in state government, also the staff is proud that this organization focuses on caring for the members/retirees because we are dealing with the long term quality of life of state employees and our responsibilities are great. The opposite side is there were staff members that indicated there was nothing in particular about this organization that made them feel proud to be an employee.

The staff was asked in question 19 if they could change one thing that they thought would have the greatest impact on improving retention, what would it be? There were overwhelming responses concerning the low pay received for the type of knowledge that has to be known about the information presented to the members/retirees. There were concerns about non existence of

CPM PROJECT CLASS 2013
CUSTOMER SERVICE—SURVEY EXECUTIVE SUMMARY

pay increases, some felt there was a lack of fairness in the hiring process, and an additional concern was about flexible work hours beyond what is already offered.

The staff was asked in question 20 are the reasons they were staying with State government different than the reasons why they first came to State government? 9 of the 23 surveyed stated they are the same, 13 indicated not the same and 1 person did not respond. Many of the comments centered on having benefits, retirement, and job security compared to the private industry. There were comments provided to indicate some dissatisfaction with the employment situation.

The staff was asked in question 21 about their career plans at this time. 15 of the 23 surveyed indicated they would either retire or leave state employment within one to ten years. The remaining 8 have no plans to retire or leave state employment in the foreseeable future.

The staff was asked to rate the following questions on a scale of 1 to 4, where 1 = Strongly Disagree and 4 = Strongly Agree. For the purpose of the overall summary of responses, I combined the results for the strongly disagree and disagree (1&2) together and strongly agree and agree (3&4) together. The results are as follows.

01. I feel that I am an important member of this organization

15 out of 23 Agree

08 out of 23 Disagree

02. I feel that I am an important member of my work team

22 out of 23 Agree

01 out of 23 Disagree

03. I am clear on the scope and responsibilities of my job

22 out of 23 Agree

01 out of 23 Disagree

04. The amount of stress I am under negatively impacts my performance

13 out of 23 Agree

10 out of 23 Disagree

05. I know what the people I work with expect of me

20 out of 23 Agree

03 out of 23 Disagree

06. I feel the policies, rules, procedures, and regulations of the organization that affect my job are clearly defined

20 out of 23 Agree

03 out of 23 Disagree

07. My organization hires people who are qualified to do their jobs

13 out of 23 Agree

10 out of 23 Disagree

CPM PROJECT CLASS 2013
CUSTOMER SERVICE—SURVEY EXECUTIVE SUMMARY

08. My supervisor communicates effectively with us

19 out of 23 Agree

04 out of 23 Disagree

09. I feel I am fairly compensated for my work

09 out of 23 Agree

14 out of 23 Disagree

10. I am aware of opportunities for advancement or promotion that exist for me

11 out of 23 Agree

12 out of 23 Disagree

11. The benefits I receive are an incentive to remain employed by state government

11 out of 23 Agree

12 out of 23 Disagree

12. I would turn down a job at a comparable pay and prospects in another organization to stay with this organization

10 out of 23 Agree

13 out of 23 Disagree

13. I am given adequate training to do my job

22 out of 23 Agree

01 out of 23 Disagree

14. My employer really shows this organization cares about its employees

09 out of 23 Agree

14 out of 23 Disagree

15. My supervisor and I have a good work related relationship

21 out of 23 Agree

02 out of 23 Disagree

16. You are satisfied with your job

16 out of 23 Agree

07 out of 23 Disagree

17. I believe we have open communication between personnel and leadership in this organization

09 out of 23 Agree

14 out of 23 Disagree

I asked the Customer Service Call Center and Visitors' Center staff to **rate the factors** as to how important each factor was to them. The categories were: "Not at all important to Very important" The results are as follows.

Your pay

00 out of 23 indicated “Not at all important”
00 out of 23 indicated “Not very important”
00 out of 23 indicated “They are neutral”
02 out of 23 indicated “Some what important”
21 out of 23 indicated “Very important”

Rate the factors continuous:

Your benefits

00 out of 23 indicated “Not at all important”
00 out of 23 indicated “Not very important”
02 out of 23 indicated “They are neutral”
04 out of 23 indicated “Some what important”
17 out of 23 indicated “Very important”

Your Relationship with Co-Workers

00 out of 23 indicated “Not at all important”
00 out of 23 indicated “Not very important”
01 out of 23 indicated “They are neutral”
10 out of 23 indicated “Some what important”
12 out of 23 indicated “Very important”

Your Relationship with your Supervisor

00 out of 23 indicated “Not at all important”
00 out of 23 indicated “Not very important”
02 out of 23 indicated “They are neutral”
07 out of 23 indicated “Some what important”
14 out of 23 indicated “Very important”

The Quality of Supervision you receive

01 out of 23 indicated “Not at all important”
01 out of 23 indicated “Not very important”
03 out of 23 indicated “They are neutral”
05 out of 23 indicated “Some what important”
13 out of 23 indicated “Very important”

The commitment of Organizational leadership

01 out of 23 indicated “Not at all important”
01 out of 23 indicated “Not very important”
03 out of 23 indicated “They are neutral”
06 out of 23 indicated “Some what important”
12 out of 23 indicated “Very important”

Your opportunity for growth and advancement

00 out of 23 indicated "Not at all important"
00 out of 23 indicated "Not very important"
01 out of 23 indicated "They are neutral"
03 out of 23 indicated "Some what important"
19 out of 23 indicated "Very important"

Your personal commitment to the work you do

00 out of 23 indicated "Not at all important"
01 out of 23 indicated "Not very important"
00 out of 23 indicated "They are neutral"
03 out of 23 indicated "Some what important"
19 out of 23 indicated "Very important"

____ **other: Please explain. Comments made were:**

- The room for growth and advancement are not in the customer service area because it seems one has to be a "favorite." The answer to #6 is based on us not knowing what the changes are. Some of us feel that changes will strongly impact us and the management staff is aware but they don't want to say "anything just yet."

18. Is there anything in particular about this organization that makes you feel proud to be an employee here?

COMMENTS ARE:

- I think that the agency dose try and do its best for the members
- The overall public opinion of SCRS, the quality of customer service and professionalism exhibited on a consistent basis to our members while addressing their concerns
- The agency promotes longevity
- Unfortunately, it's not. The opportunities for advancement are not with this department because I have seen too many times where certain managers have their "picks" and options are based on being the favorite if you are given the opportunity. Seeing this and a lot more does not make me feel proud to be an employee here.
- NO
- One thing that makes me proud to be an employee here is the dedication we show to our members and the hard work shared amongst the employees to give the best possible service to each member.
- NO
- I'm thankful I have a job but do I feel PROUD to be an employee here? I still have to ponder that question.
- A real commitment to serve the public!
- NO

CPM PROJECT CLASS 2013
CUSTOMER SERVICE—SURVEY EXECUTIVE SUMMARY

- At this organization, I feel at home away from home. I hope with the restructuring and reorganization of the Retirement Systems/PEBA management/employee would maintain that caring, family relationship.
- I am proud that this organization has a strong focus on caring for the individual (members/retirees). We are dealing with the long term quality of life of state employees so our responsibilities as an organization are great
- The morale is great, and it is a pleasure to come to work each day. We help other members with their benefits and receive a great amount of satisfaction by being able to help with their questions.
- Helping people
- Many people believe we are not aware we are a state agency, and feel that the organization is run as efficiently as a private organization.

19. If you could change one thing that you think would have the greatest impact on improving retention, what would it be?

COMMENTS ARE:

- Hiring better people not friends of friends and paying a better salary, starting and otherwise
- Pay that would be more in line with the overall importance of the responsibility we have as it relates to educating, consulting, and responding to the overall needs of our members as they move toward, prepare for, and enter retirement. We are very much the equivalent of a financial consulting firm and our pay is very much out of line with that responsibility in the private sector. The disparity in pay is also a major concern.
- Offer pay raises to all employees not some
- We are very underpaid for the type of work that we do as benefit counselors. One holding this position has to be very knowledgeable about the different retirement plans, rules and regulations. Other states that have similar positions or job duties have better benefit packages. The salary should be based on years of prior experience working in a call center, customer service environment, education level, and prior management experience. The starting salary for one that has at least 5 years of customer service experience, and a bachelor degree should be \$43,000.00. We really need a raise because the cost of living is increasing.
- Fairness in the organization
- Offer competitive pay so we can hire intelligent people and give incentive raises to retain and motivate customer service agents to continue taking the crassness and verbal abuse from the infinite queue of member phone calls day after day after day.-----Allow more flexible hours so we can spend more time with family. So much time is taken from my day just traveling to and from our office location and the only 2 work shifts we are offered are both right in the middle of "rush hour".
- I believe that morale is extremely low among many individuals that work within my agency. I believe an incentive plan should be implemented in order to reward those who put a great deal of effort into making sure that our organization runs efficiently.
- I would INCREASE the salary range for Benefit Counselors in Customer Services!

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CUSTOMER SERVICE—SURVEY EXECUTIVE SUMMARY

- First, I would pay people a comparable salary for the job they are performing. Research shows for the amount of work that is completed the salary is too low. There is so much required of you daily and you feel you give 110% but you realize you're just a number. Management feels if you leave, there will be someone to take your place. Doesn't it cost more to hire new people vs. trying to retain the ones you already have?
- Significant increase in salary!
- Preferential treatment of certain employee. Employees should be rewarded based on their job performance, not based on (1) how much "noise" they make about not getting what they want, (2) who they are friends with, or (3) how long they have been here. The better employees are leaving because of this "Good Ole Boy" system.
- Fair compensation. Have equal standards for all employees.
- Salary
- I think there are a number of troublesome inequities in the organization. I feel that the way employees are promoted and paid is not always fair and is not based on Job performance, education, experience, knowledge but often on prearranged decisions. It definitely has an impact on morale when as an employee you do all that you can to do a good job and to improve yourself on and off the job and it does not seem to matter to superiors. Hard work should be rewarded and poor performance punished.
- A Pay raise on a regular basis.
- Aside from competitive pay, I would think an increase in the opportunity for career progression would have the greatest impact on employee retention.
- MORE COMPENSATION INCREASES
- Increase salaries to compare with private industry. I feel as if dedicated hard working employee should be rewarded
- More communication
- I believe that additional levels for promotion /advancement in our particular department may improve retention. Currently, there are only four levels of counselors/managers

20. Are the reasons you are staying with State government different than the reasons why you first came to State government? Yes 9 No 13 1 No Response

Explain.

COMMENTS ARE:

- Initially I just needed a job. Now I stay for the benefits and retirement.
- The reason I am currently staying with the State Government is because I haven't been able to get a job offer outside the agency
- If I am not given the opportunity to show my talents and advance in the state, staying here will not benefit me in my career.
- My initial pursuit for a state government position was for the benefits and genuine interest in the position I applied for. However, with the rising cost of insurance premiums and the lack of compensation increases, I can honestly say, I am contemplating the pursuit of another position/career in the near future.

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- I fairly like my job, but through the years you look at the buddy system, the politics and think why I am still here? I figure be patient they will eventually see your hard work and dedication, the good reviews on job performance, but you see some have been here less time than you and are put on special projects and even promoted. Well if management doesn't appreciate you it's time to make changes. Grocery and gas has increased it's time for me to put more potential in myself; I can do better and stop settling.
- I came simply because I needed a job....I stay because my actual job satisfies my own personal skills and desire to serve.
- The longer that you work for state government the harder it is to leave, especially in today's job market.
- Stability is state government was the initial attraction. Due to changes in the economy and government leadership, employment with state government is no longer viewed as stable (furloughs, budget cuts, hiring/pay freezes).
- I came to state employment for the benefits and working conditions and the retirement benefits. I enjoy my job and the people I work with.
- Good benefits
- Relative job security as compared to private industry

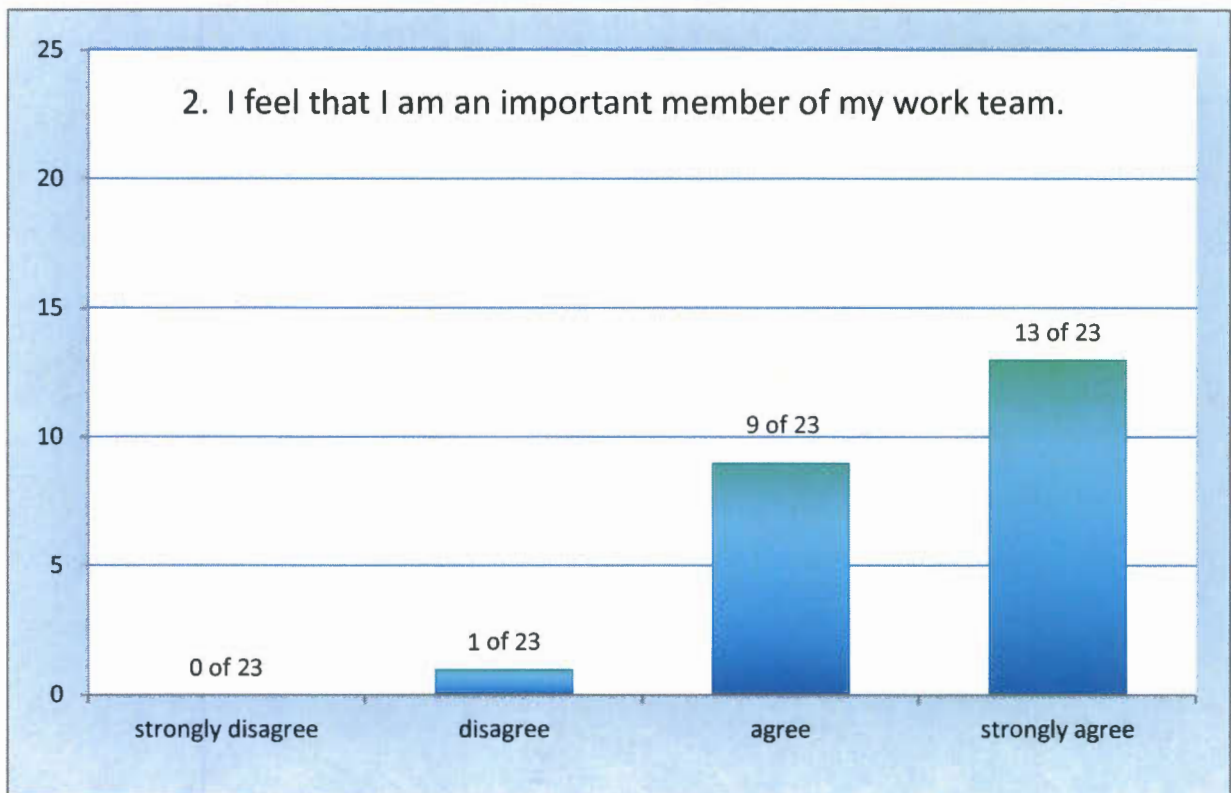
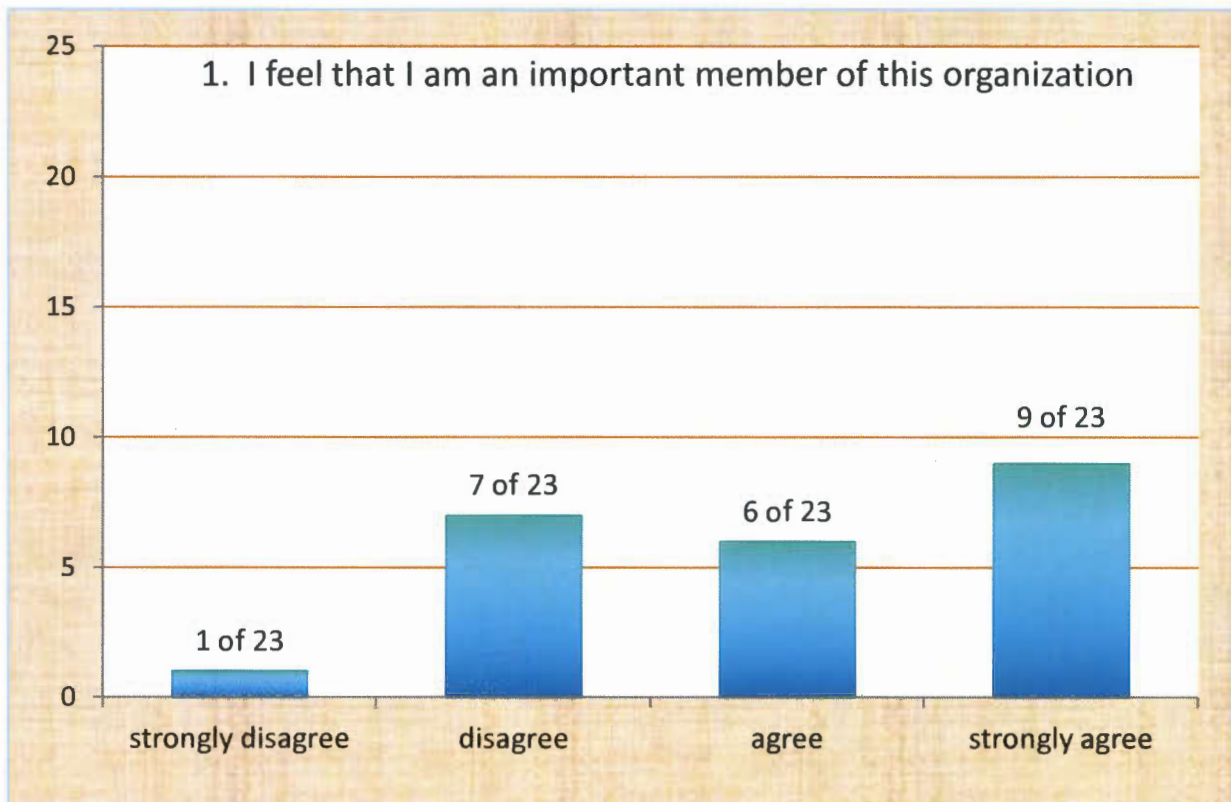
21. As you think to the future, which of the following best describes your career plans at this time?

- ☐ 4__ Retire or leave State employment within 1-2 years
- ☐ 7__ Retire or leave State employment within 3-5 years
- ☐ 4__ Retire or leave State employment within 6-10 years
- ☐ 8__ No plans to retire or leave State employment in the foreseeable future

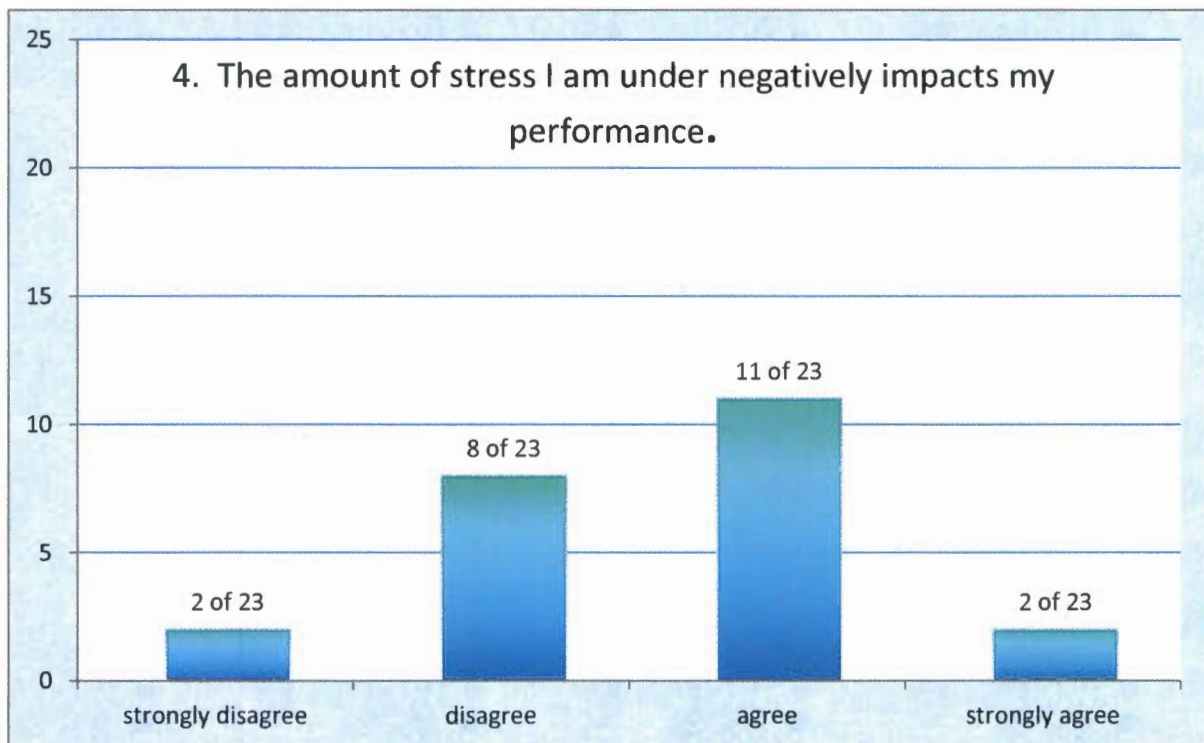
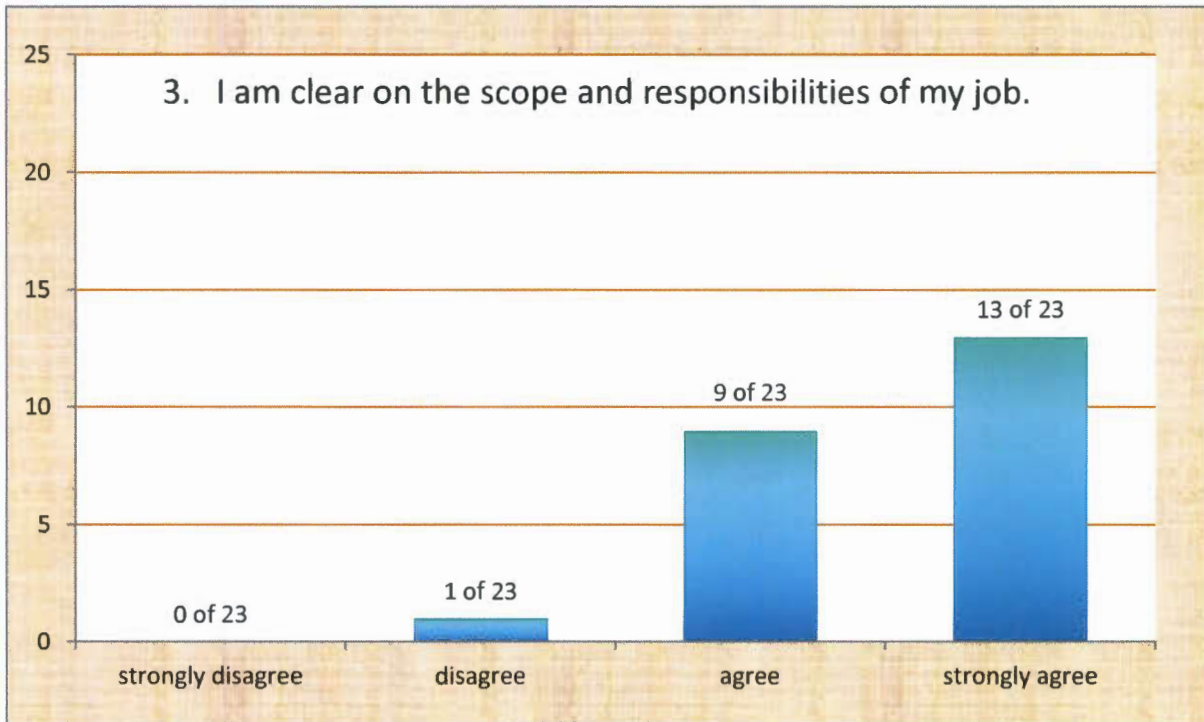
Appendix O

CC/CI Charted Survey Responses by Question

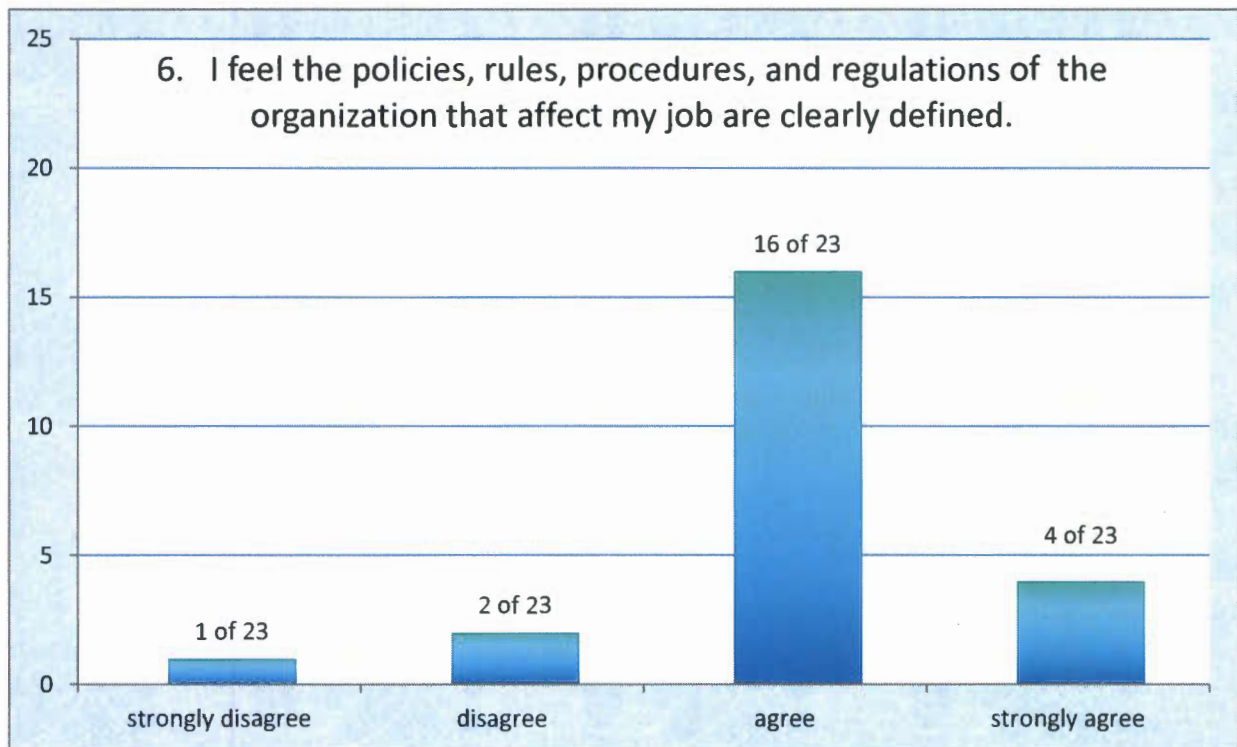
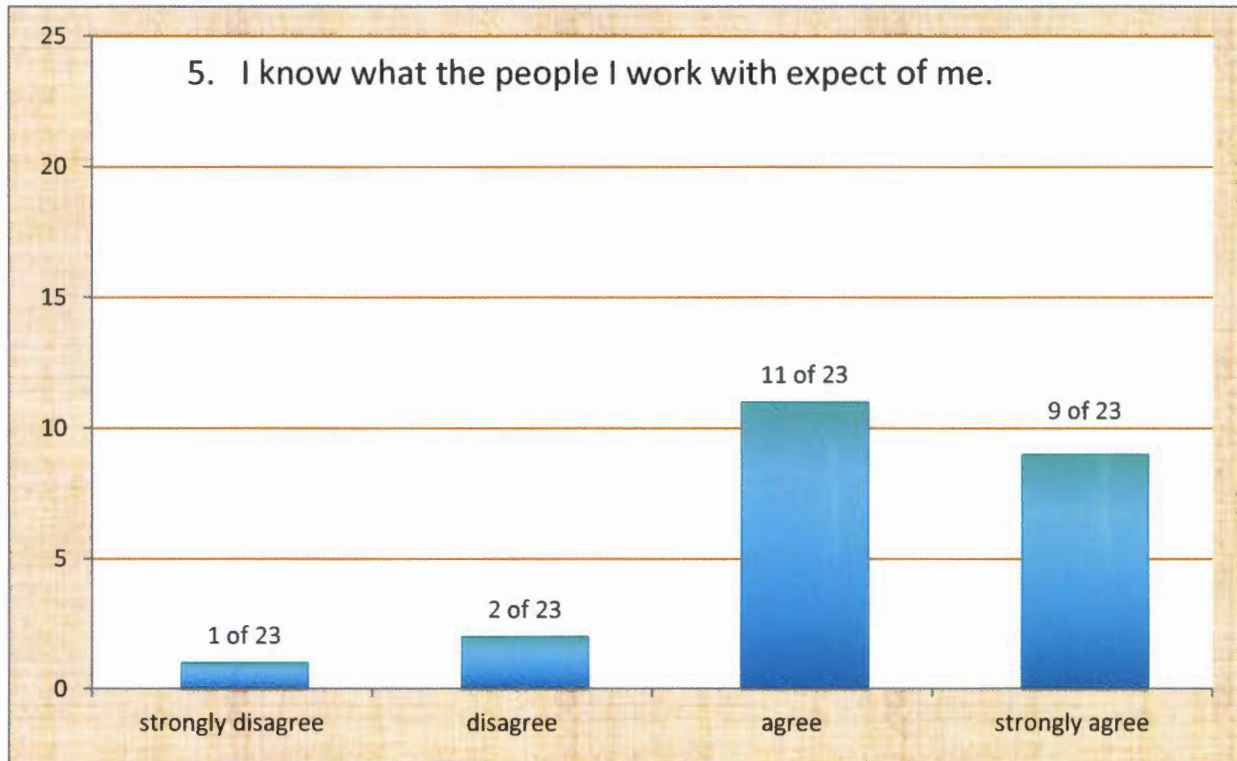
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CC/CI CHARTED SURVEY RESPONSES BY QUESTION



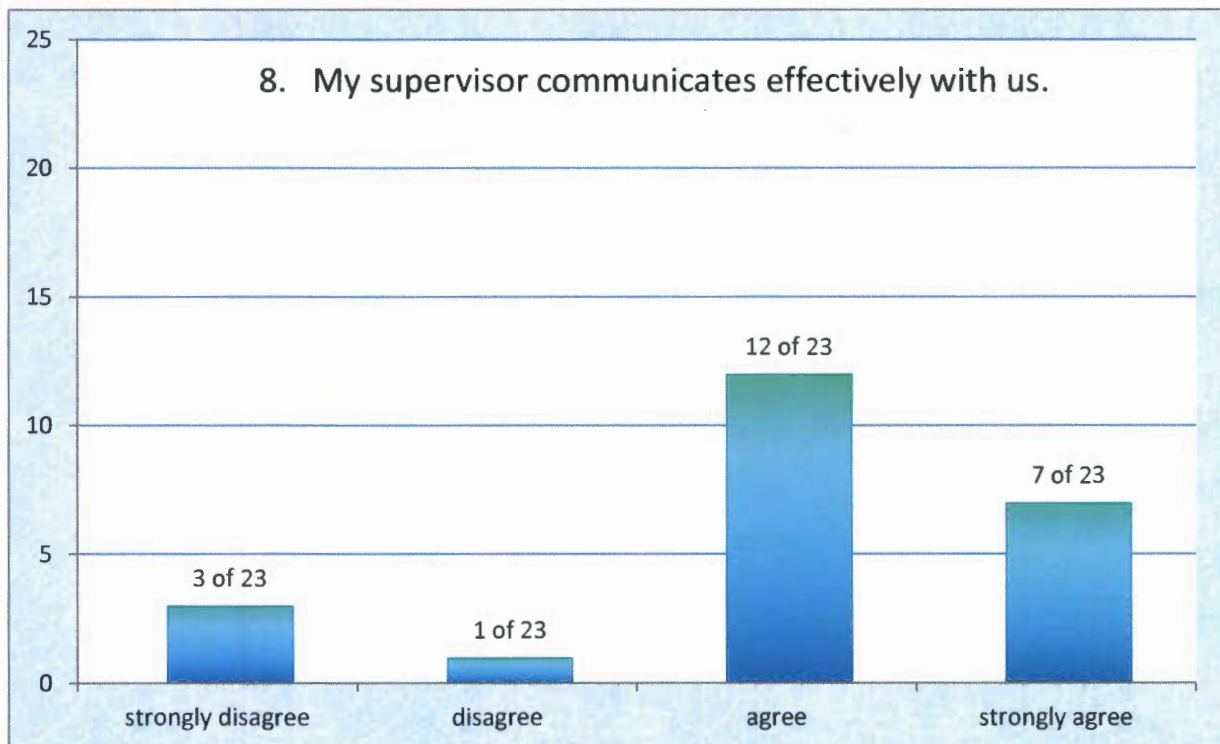
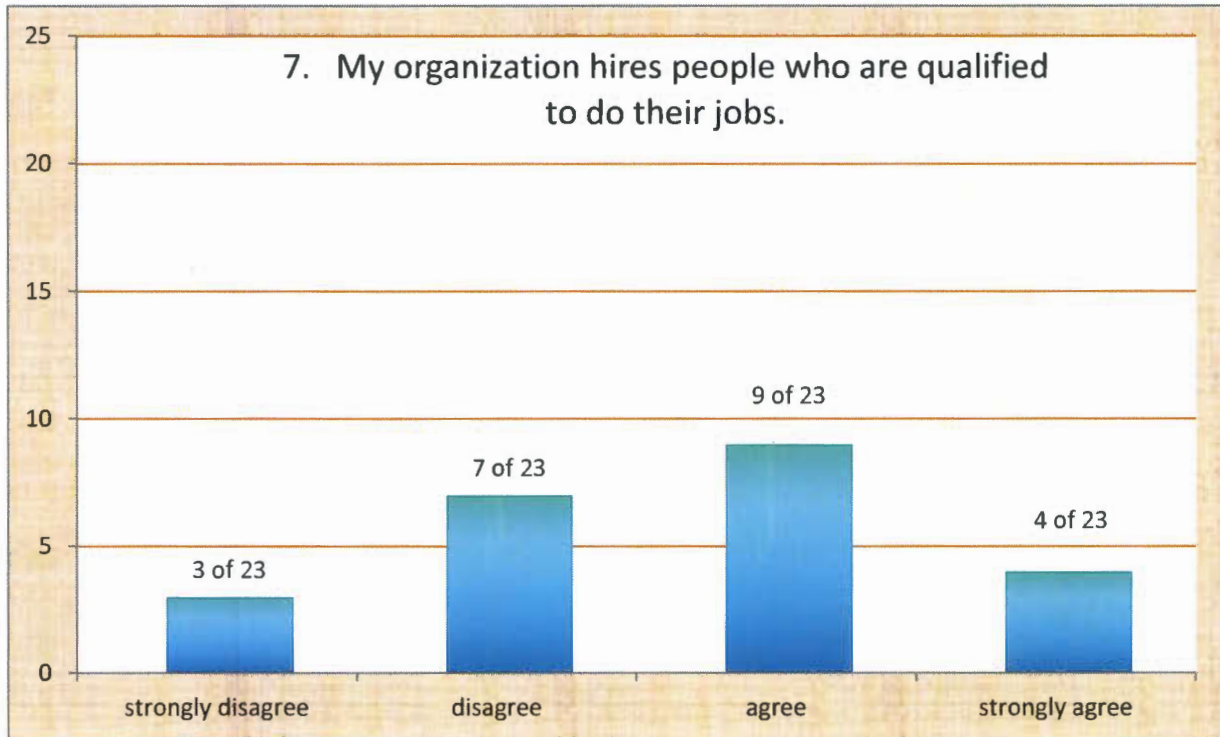
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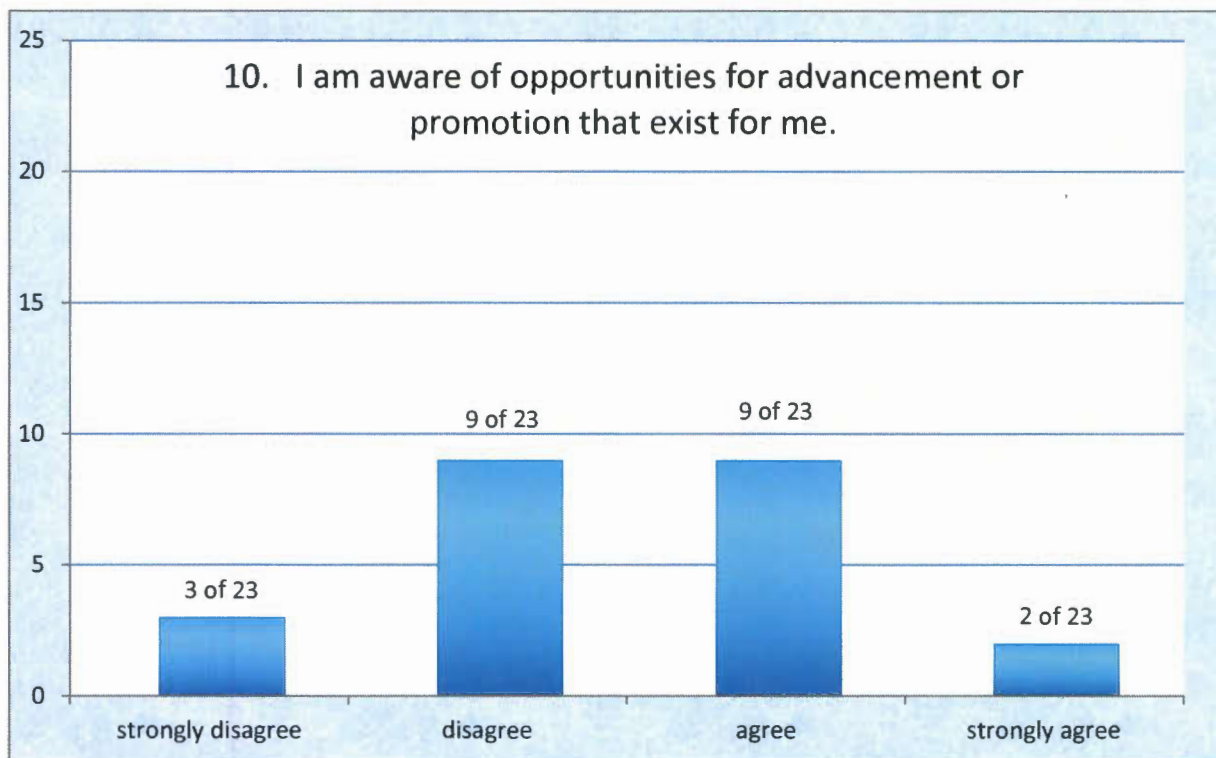
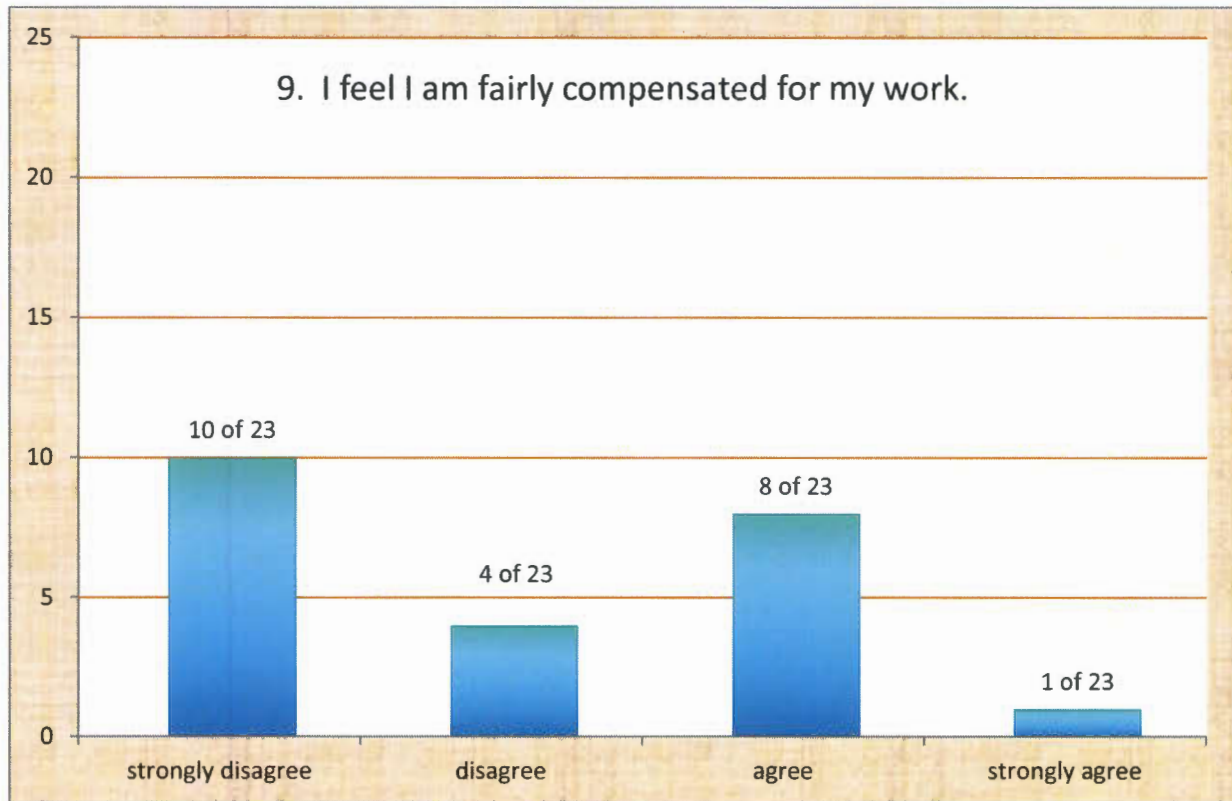
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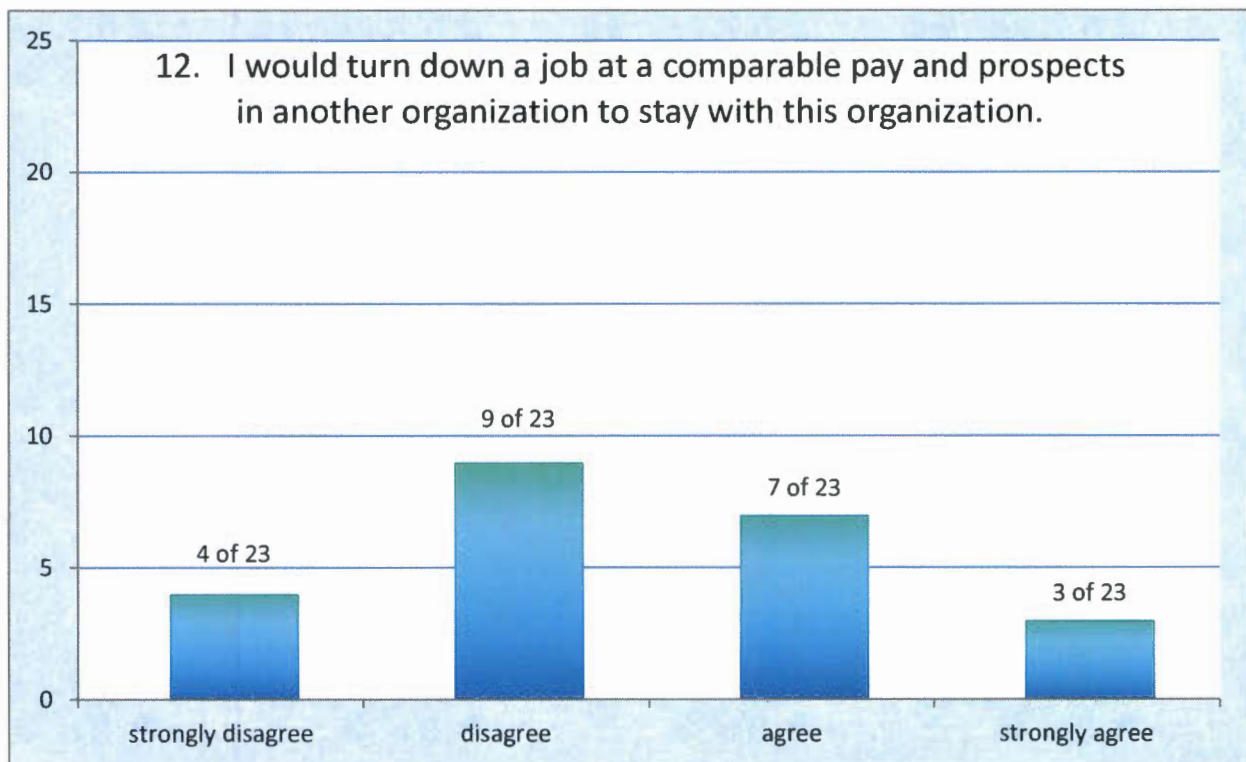
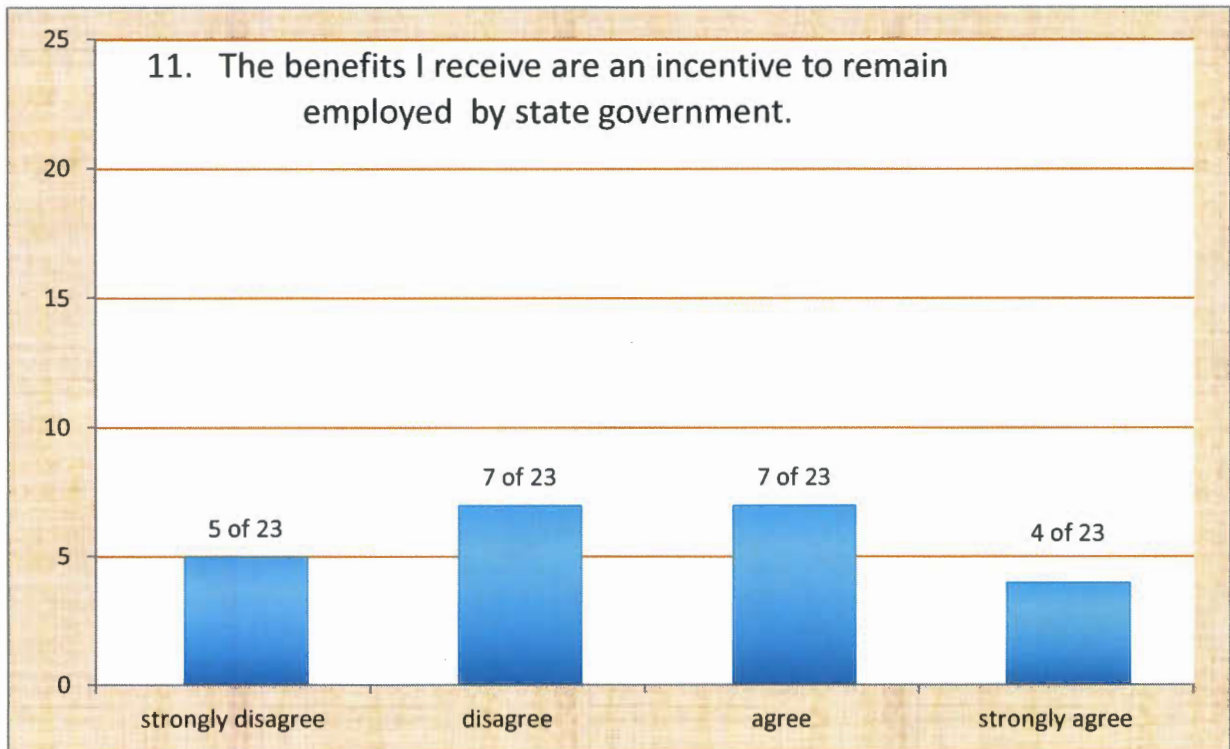
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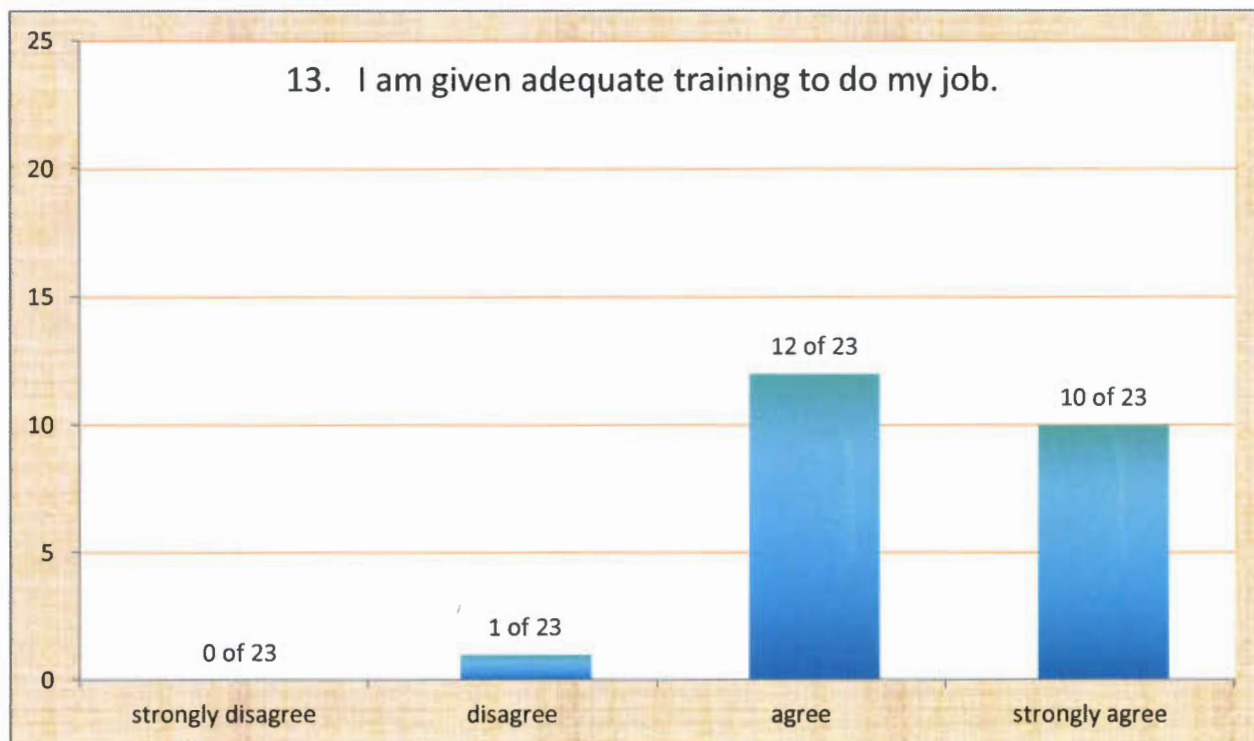
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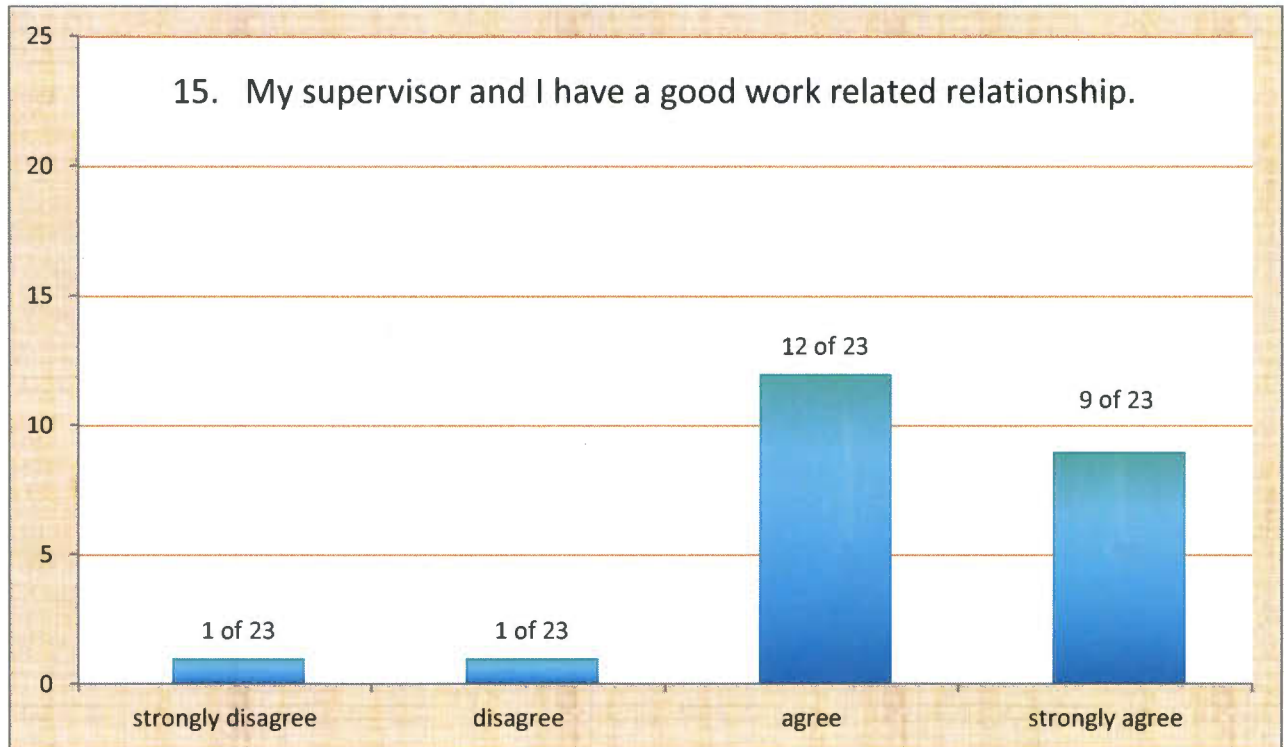
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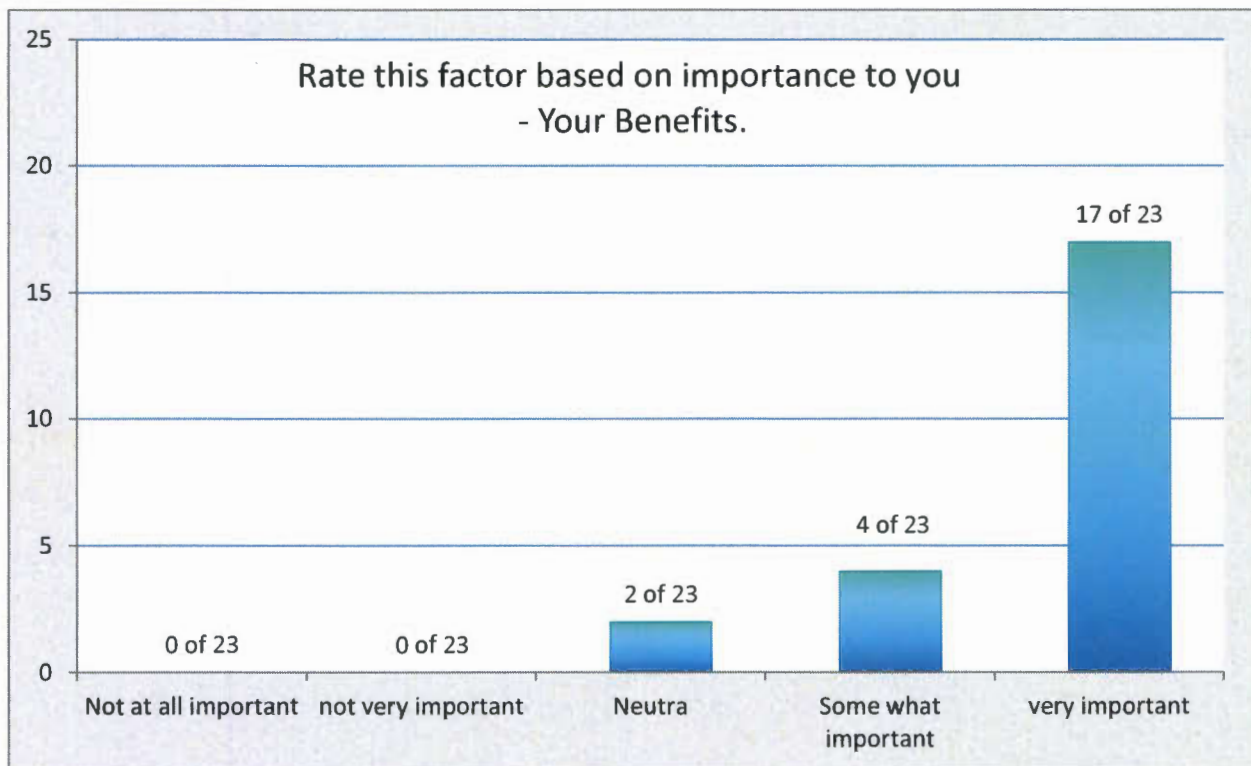
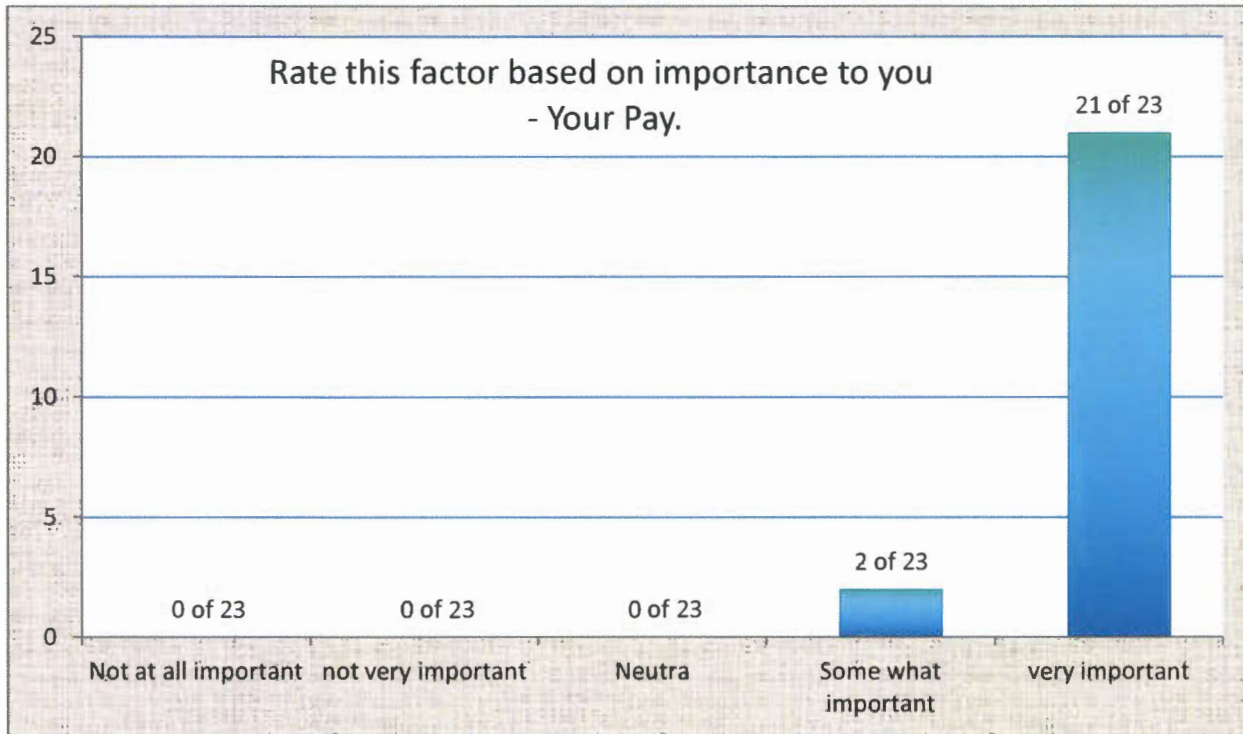


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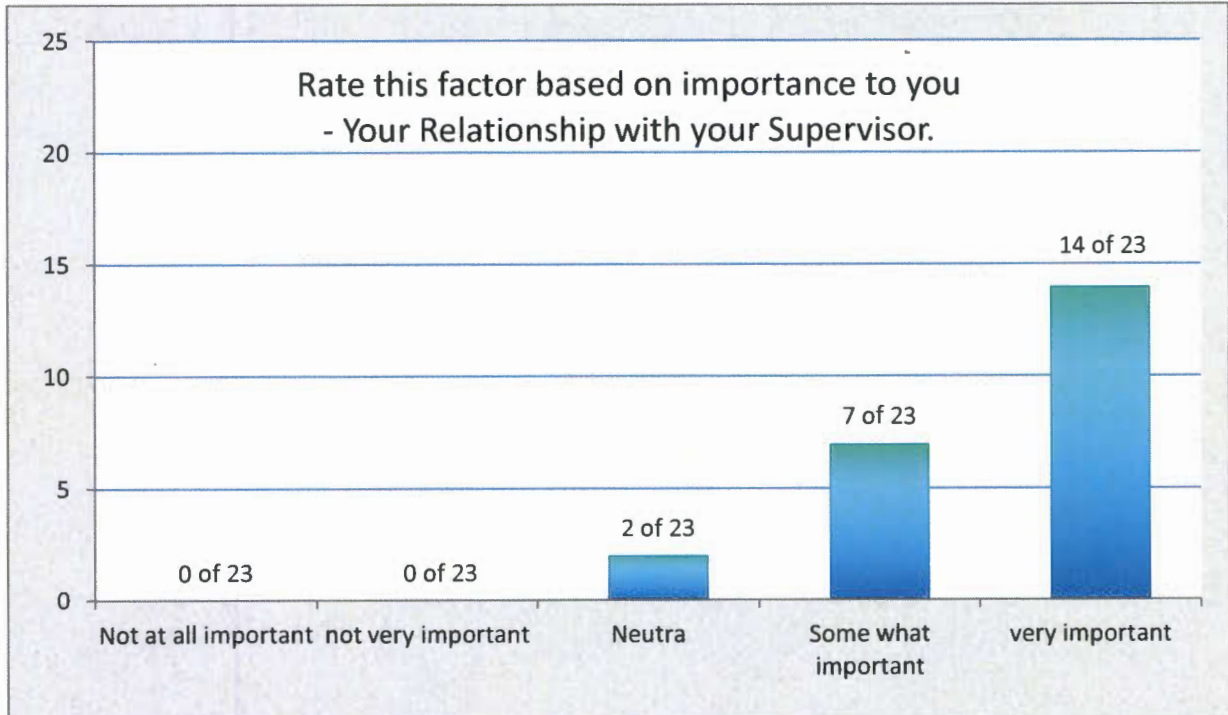
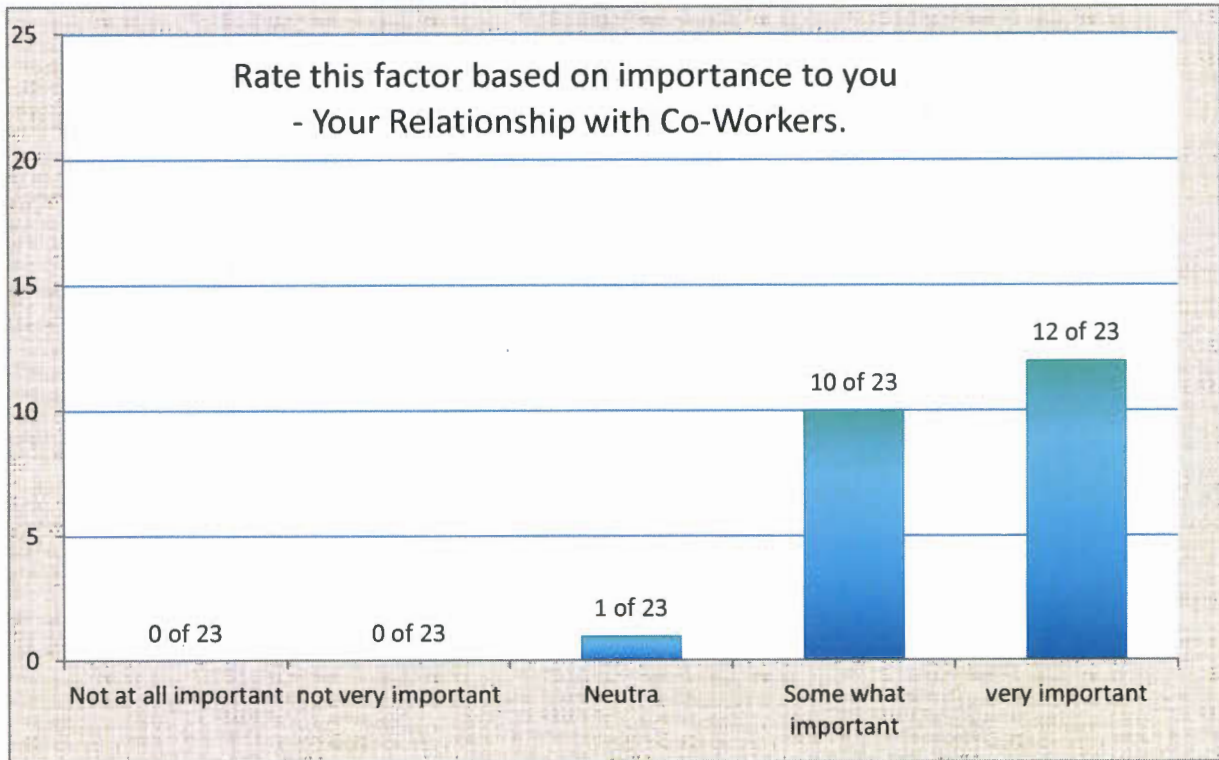


SEE APENDIX N FOR RESPONSES TO QUESTIONS 18 AND 19

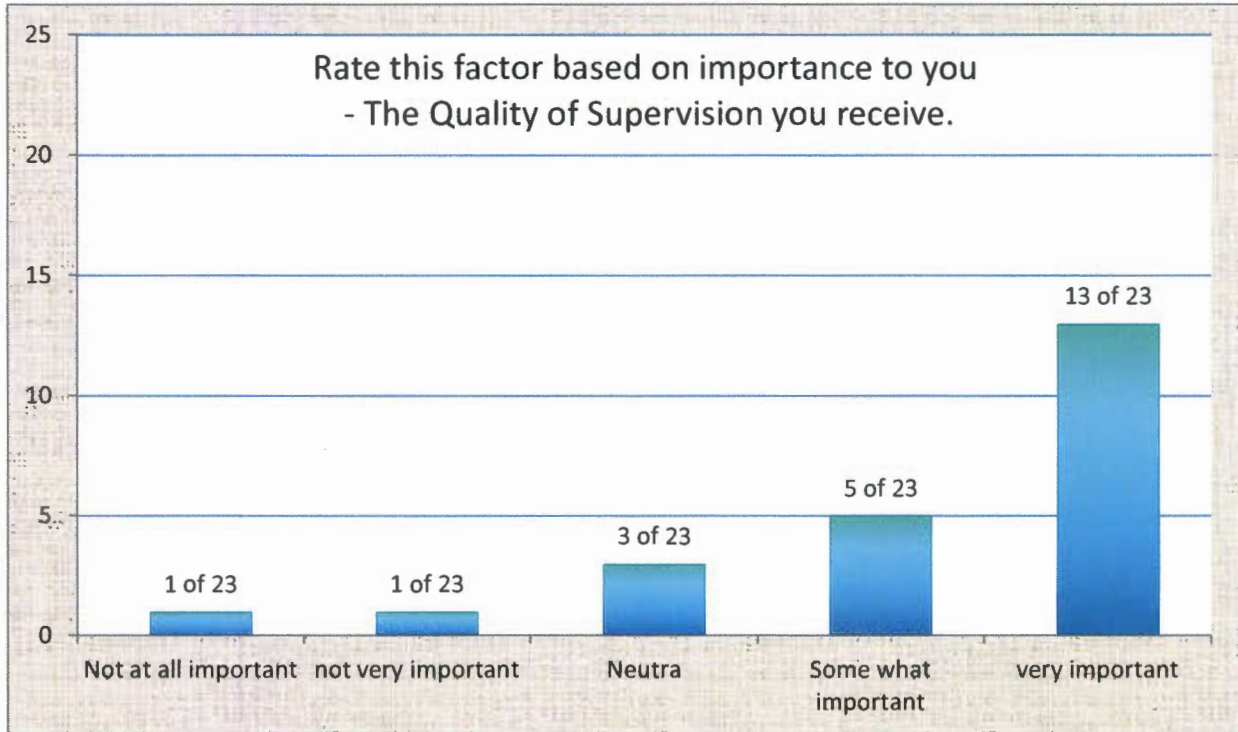
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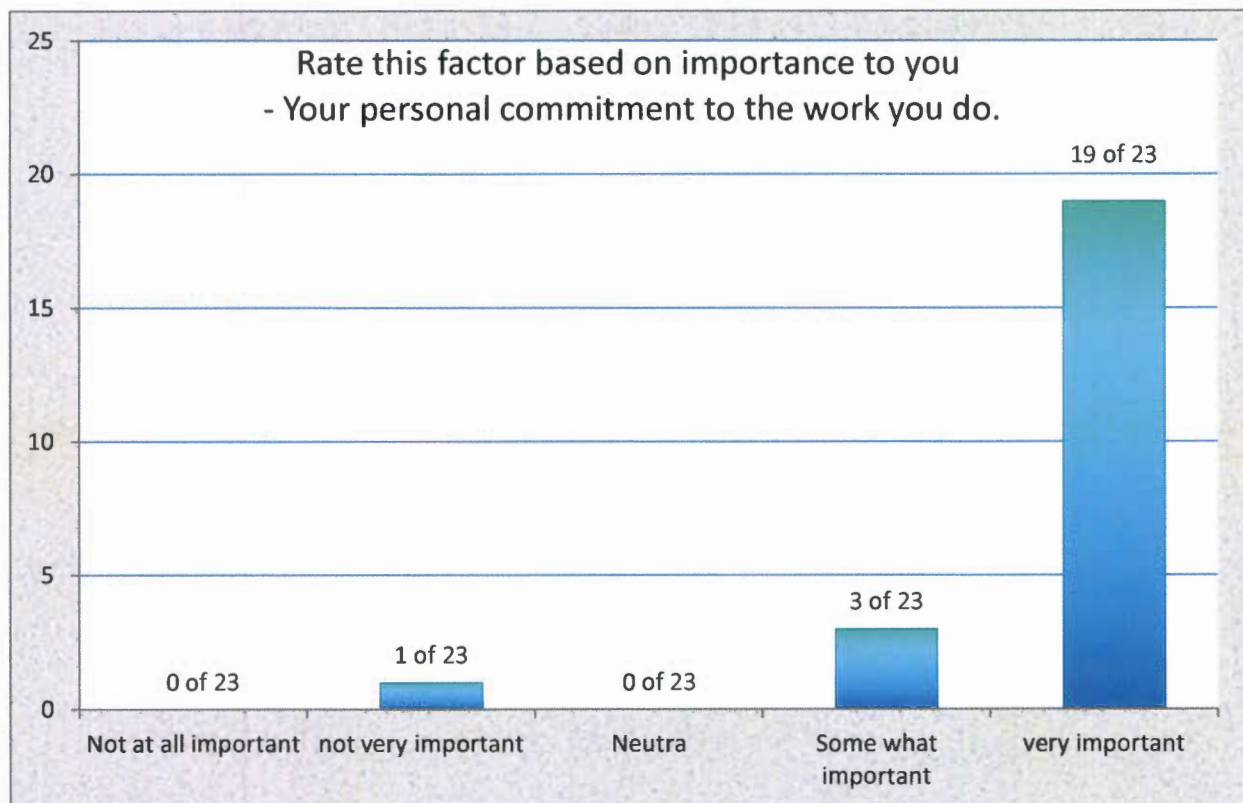
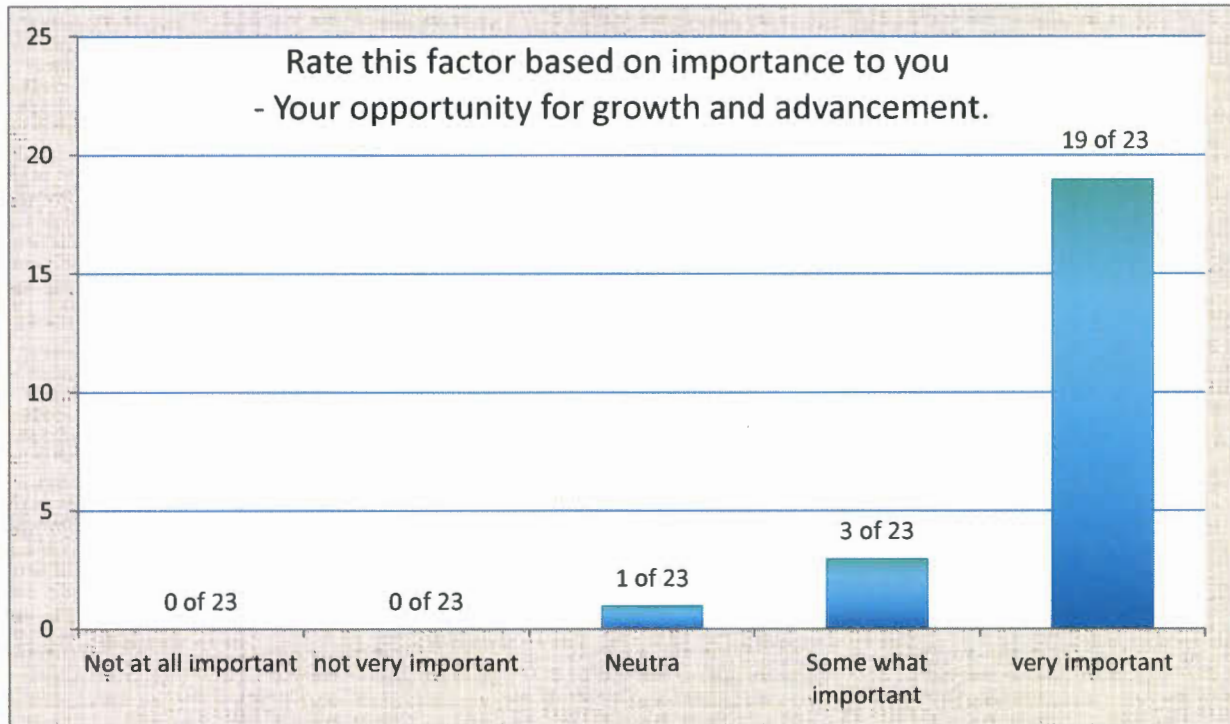
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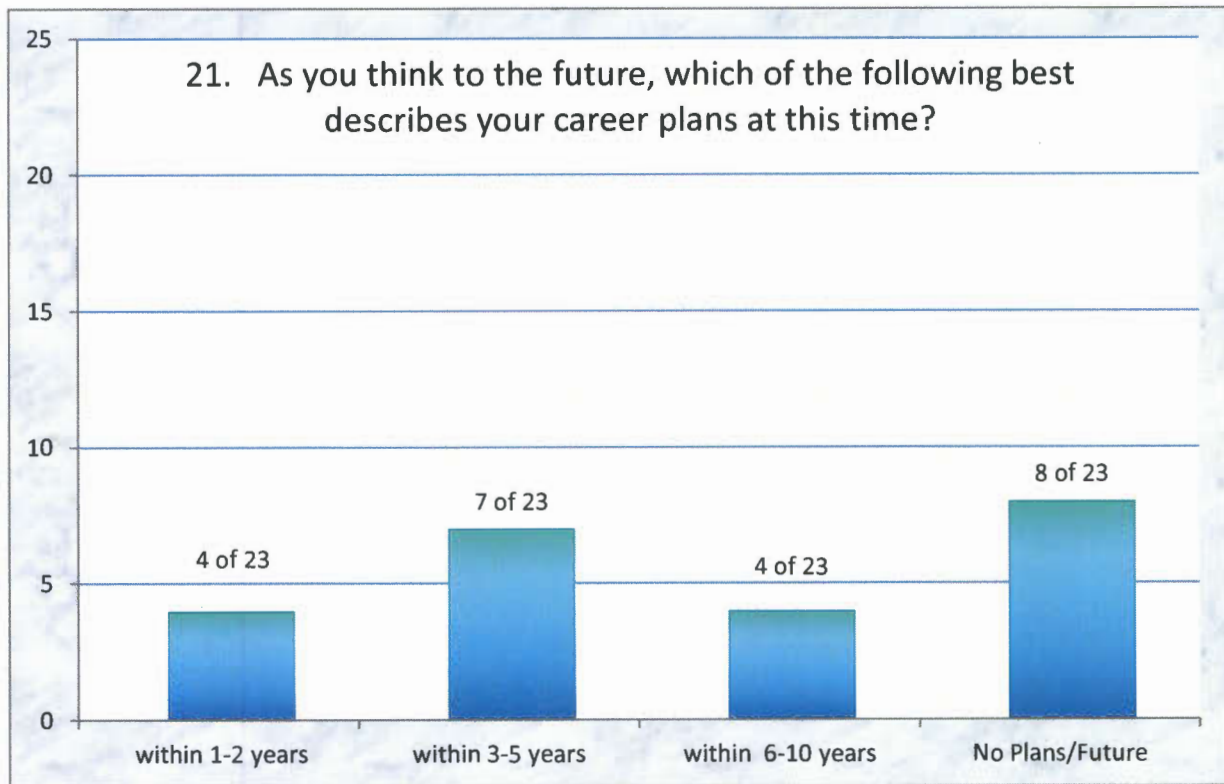
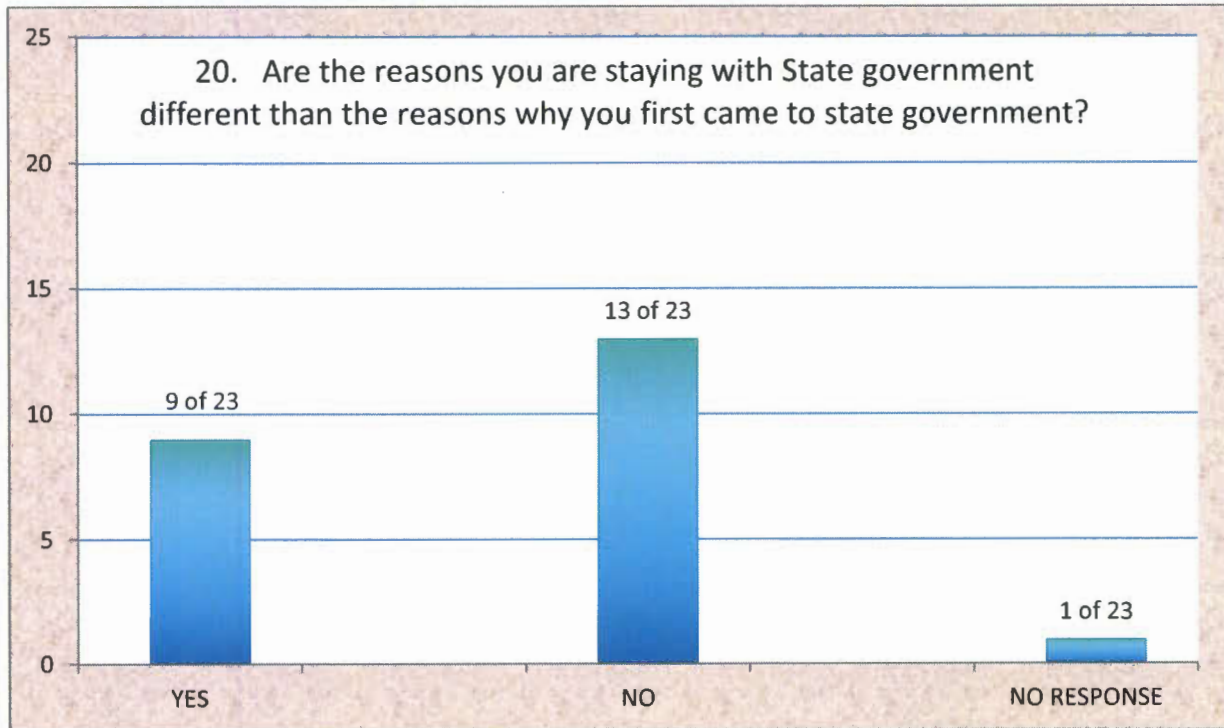
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Appendix P

Charts:

Fiscal Year Calls and Visitors Data
Retirement Systems Staff Available for Visitors
Calls Abandoned While Waiting Adjustments
Answered/Abandoned Calls and Visitor Consultations Data
Customer Service Additional Staffing Calculation

CPM Project--CLASS 2013
Customer Service Summary
Fiscal Year Calls and Visitors Data

	FY 2012		FY2011		FY2010		FY2009	
	Totals	Daily Average (1yr/247)	Totals	Daily Average (1yr/247)	Totals	Daily Average (1yr/247)	Totals	Daily Average (1yr/247)
Calls								
Total Incoming Calls *	215,029	871	213,232	863	181,624	735	174,617	707
Total Answered Calls	164,759	667	156,029	632	151,163	612	149,079	604
Calls Abandoned	50,270		57,203		30,461		25,538	
Calls Abandoned Tax Changes	0		18,000		0		0	
Calls Abandoned if No Tax Chg	50,270		39,203		30,461		25,538	
Visitors								
Total Visitors-	17,358	70	13,586	55	13,621	55	13,130	53

Note that the information provided is reflective of previous months and not indicative of current workloads. SCRS CS has experienced a dramatic increase in call/visitor volumes beginning in January 2012 due to legislative changes. During the period of 1/1/2012 to 7/31/2012: CS visitor center experienced a 29.8% increase in visitor volume as compared to the same period in 2011. The CS call center experienced a 9% increase in call volume comparing the same time periods- however there was a 3 day period from 1/31/11 to 2/2/11 where there were over 18,000 calls due to federal tax table changes. If this event is factored out, there is a 26% increase in call volume for the same time period as the previous year. This trend is expected to continue for the next several months.

* Not all incoming calls are answered. The total incoming number represents all the calls that hit the phone switch between 0800 and 1730 each day (including weekends and holidays).

Departmental Goals:

- Calls answered within 3 minutes
- Visitors seen within 15 minutes
- High call/abandon volume on 1/31/2011 due to tax table changes (10,277 calls on 1/31/11)

Survey Information Summary of Retirement Systems
Staff Available for Visitors

Retirement Systems	Number Systems admin	Membership Size	Avg calls per day	Staff available for calls	Avg calls per Staff member per day	PT	Avg Visitors per day	Staff available for VISITORS	Avg visitors per Staff member per day
Washington State Department of Retirement System (DRS)	8 Sys and 1 program	479,481	866	87	10	X2	28	87	1
Iowa Public Employees, Retirement System (IPERS)	1	328,975	375	26	14		15	26	1
New York State Teachers' Retirement Systems (NYSTRS)	1	427,000	385	22	18		28	22	1
California State Teachers' Retirement System (CalSTRS)	3	862,192	1228	50	25	X3	50	13	4
Teacher Retirement System of Georgia (TRS)	1	394,000	350	26	13		18	13	1
South Carolina Public Employee Benefit Authority (PEBA Retirement Benefits)	6	530,446	667	21	32	X1	70	11	7 rd
North Carolina Retirement System (NCRS)	4	850,000	1100	27	41		100	11	9
Employees Retirement System of Texas (ERS)	4	222,000	250	11	23		25	11	2
Arizona State Retirement Systems (ASRS)	5	538,776	520	40	13	X4	70	10	7
Illinois Municipal Retirement Fund (IMRF)	3	275,528	600	23	26		18	8	2
Louisiana State Employees' Retirement System (LASERS)	1	152,725	200	7	29		40	7	6
Missouri State Employees' Retirement System (MOSEERS)	4	105,617	124	7	18		15	7	2
Indiana Public Employees Retirement Fund (PERF)	6	500,000	400	20	20		30	5	6
Virginia Retirement System (VRS)	5	600,972	1000	52	19	X17	10	5	2
Alabama Employees' Retirement System (ERS)	3	373,209	80	22	4	X	20	3	7

CPM Project--Class 2013

Customer Service Summary

Answered/Abandoned Calls and Visitor Consultations Data

Fiscal Year	Fiscal Year	Fiscal Year	Fiscal Year
2011-2012	2010-2011	2009-2010	2008-2009

Total Inbound Calls =	215,029	213,232	181,624	174,617
Total Abandoned =	44,474	35,786	23,044	18,947
Total Busy/disconnected =	5,172	20,359	6,143	5,219
Flow out/Voice Mail =	624	1,058	1,274	1,372
Total Calls not Answered	50,270	57,203	30,461	25,538
Calls Answered =	164,759	156,029	151,163	149,079

Total Visitor Consultations	17,358	13,586	13,621	13,130
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CPM Project---Class 2013
Calls Abandoned While Waiting Adjustments

Calls Abandoned While Waiting to Be Answered not Including Busy
Disconnected or Rolled Over to Another Phone Line

Fiscal Year	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	Sum
FY 2009	1968	1499	1562	2607	2408	2263	2632	2158	1874	1432	2152	1547	24102
FY 2010	1749	1480	1812	2810	3797	2695	2483	2229	2269	1889	2833	3052	29098
FY 2011	3126	2406	2111	3360	4073	3578	18564	9420	2295	1988	2633	2550	56104
FY 2012	1969	2127	1691	2999	2055	1975	3302	2449	3234	4116	8149	10408	44474
4 Year Totals	8812	7512	7176	11776	12333	10511	26981	16256	9672	9425	15767	17557	153778
4 Year Average	2203	1878	1794	2944	3083	2628	6745	4064	2418	2356	3942	4389	38445

Note: January and February 2011 had an unusual high call volume of calls because of federal tax changes.

Calls Abandoned While Waiting to Be Answered Adjustments

Fiscal Year	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	Sum
FY 2009	1968	1499	1562	2607	2408	2263	2632	2158	1874	1432	2152	1547	24102
FY 2010	1749	1480	1812	2810	3797	2695	2483	2229	2269	1889	2833	3052	29098
FY 2011	3126	2406	2111	3360	4073	3578	2806	2279	2295	1988	2633	2550	33205
FY 2012	1969	2127	1691	2999	2055	1975	3302	2449	3234	4116	8149	10408	44474
4 Year Totals	8812	7512	7176	11776	12333	10511	11223	9115	9672	9425	15767	17557	130879
4 Year Average	2203	1878	1794	2944	3083	2628	2806	2279	2418	2356	3942	4389	32720

Adjustment Calculations:

January 2011	2632	2483	3302	=	8417 divided by 3	=	2806 average
February 2011	2158	2229	2449	=	6836 divided by 3	=	2279 average

CPM Project---Class 2013
Customer Service Additional Staffing

Average yearly abandoned calls	32,720
Work days in a year	247
Average abandoned calls per work day	132
Average calls per staff per day	32

Calculations:

$$32,720/247=132.46 \text{ (132)}$$

$$132 \text{ divided by } 32 = 4.13 \text{ (4)}$$

This calculation indicates the SCRS Call Center needs at least four additional full time employees on a daily basis.